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NEWSPAPER

May 18, 1987

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Advertising Age

Crain's International Newspaper of Marketing. In Two Sections. Section 1.

Illustration by John Figler

P&G, Clorox lead Florida ad rebellion

By STEVEN W. COLFORD

Procter & Gamble last week directed its agencies to stop spot media buys in Florida after June 30 because of the state's 5% sales tax on advertising.

Robert Goldstein, P&G VP-advertising, said the billion-dollar advertiser will not place media ads in Florida until it weighs the impact of the tax and the needs of its brands. P&G's fiscal year begins July 1, the day the tax becomes law.

But a P&G agency source said the advertising halt, which does not include national media buys, will remain in effect until the tax is repealed.

P&G's move echoed Clorox Co.'s decision earlier last week to cancel spot buys in Florida, and other advertisers are expected to follow suit as pressure for an advertiser boycott picks up steam.

The Florida tax has drawn the wrath of the ad industry because it would be applied to all advertising coming into the state. Even national advertising placed outside the state would be affected if it runs in Florida. Other states tax advertising, or are considering a tax, but nothing as broad-based as Florida's law. *(See related story on Page 57.)*

Its constitutionality will be reviewed by the Florida Supreme Court at the request of Gov. Bob Martinez. Industry groups plan to file comments with the court, which is expected to render an advisory opinion in June.

Spot TV for Clorox liquid bleach will end the day the 5% tax on advertising and other services goes into effect, said David Goodman, Clorox VP-advertising. Clorox will resume buys in Florida upon "indication that the tax will be rescinded in the next legislative session," he added.

Clorox, which spent more than $107 million on advertising in 1986, also is reviewing advertising in Florida for brands other than its liquid bleach, said Mr. Goodman, who serves on the boards of directors of the American Advertising Federation and the Association of National Advertisers.

Other major marketers also were considering ad boycotts. At Pet Inc., St. Louis, a senior executive said the marketer was considering discontinuing media buys in Florida, as did a spokesman for Kellogg Co., Battle Creek, Mich. "We are reviewing the Florida tax situation and its relationship to Kellogg," said the Kellogg spokesman. "We have not taken any action yet and hope the ad-tax law is repealed before we have to stop our advertising in the state."

A Bristol-Myers spokesman said the New York-based marketer of toiletries and over-the-counter medicines was "considering the situation" but no decision had yet been made. He denied reports the $350 million-a-year advertiser already had ordered a reduction in Florida buys.

Leo Burnett USA, Chicago, last week heard boycott talk from some major clients. Jack Kraft, agency vice chairman, said "at least two clients" asked it to terminate spot

(Continued on Page 104)

Massive summer push

Nabisco sets new products

By JUDANN DAGNOLI

Nabisco Brands appears to be girding for a summer marketing assault that would divert the bulk of its $70 million ad budget for cookies and crackers into as many as 16 new products.

Nabisco sales representatives are telling grocery buyers the introductions will include line extensions for the company's Ritz cracker and Almost Home and Newton cookie lines, as well as at least two specialty products targeted at competitor Pepperidge Farm.

The new-product push is scheduled to start June 22, when the East Hanover, N.J.-based unit of RJR Nabisco begins its next upcoming promotional period.

Nabisco executives could not be reached for comment.

Grocery sources said Nabisco is still in early discussions with retail buyers, and has not detailed its promotional or

(Continued on Page 104)

Last Minute News

Esty to cut staff by nearly 50%

NEW YORK—William Esty Co. will dismiss about 180 of its total 400 employees by the end of July. The cutbacks include closing the agency's 40 to 50-person Los Angeles office. The moves follow the loss of the $150 million Nissan account (AA, May 4, *et seq.*) and its resignation of the $40 million MasterCard International account. Esty now is a $150 million agency, down 70% from last year *(see related story on Page 34)*.

Analysts slam Saatchi report

LONDON—U.K. analysts complained that Saatchi & Saatchi Co. Chairman Maurice Saatchi and other top Saatchi executives refused to give a breakdown of Ted Bates Worldwide's financial results and ducked questions about possible mergers of Saatchi-owned agencies when Saatchi's half-year results were announced May 14. For the half-year ended March 31, Saatchi announced pretax profits of $93.85 million, slightly higher than analysts' predictions. Sales increased by 130% to $3.06 billion. Despite the earnings gains, Alan Gottesman, an analyst at L.F. Rothschild, Unterberg, Towbin, New York, lowered his rating of S&S' stock to "hold" from "accumulate," saying "investor perceptions may deteriorate" because of account losses and agency mergers. Saatchi's two stalled merger discus-

(Continued on Page 8)

Shops line up to bag $200M burger bundle

By PATRICIA WINTERS

Blame it on Herb.

Executive changes, franchisee discontent, stagnant sales and a tough climate in the fast-food industry all contributed to Burger King Corp.'s decision to review ad agencies for its $200 million account, currently held by J. Walter Thompson USA, New York.

But many observers conclude it really was a nerd named Herb who caused this whopper of an agency/client relationship to come undone.

Burger King "didn't fire J. Walter Thompson after Herb, but it was clearly a strike against them," said John McMillin, food-industry analyst for Prudential-Bache Securities. "After that, they tried 'Burger King Town' and now 'The best food for fast times' theme.

"Burger King gave them a chance, but three strikes and

(Continued on Page 102)

Highlights

Shortening the mini 4
TV miniseries are becoming more mini and less serial as networks cut costs and audiences turn to shorter programs.

Bloom's new president 6
The Bloom Agency, the third-largest ad agency in Dallas and 48th-largest nationwide, is changing character—in more ways then one. Last week, the agency named Seth Werner, 32, president-executive creative director of the Dallas office, filling a post that had been vacant since December.

PTL marketing plan sinks 12
When the Rev. Jim Bakker fell from grace, he took an ambitious marketing plan with him. After his banishment, the PTL's plans for wooing national sponsors were put on hold, and Larry Sims, a former General Foods brand manager serving as the network's marketing maven, was fired.

Wendy's without Welter 22
William Welter's resignation last week from Wendy's International continued the shake-up of top management and raised questions about internal support for the troubled chain's turnaround strategy.

Chevy dealers unconvinced 26
While General Motors Corps.' Chevrolet division and Procter & Gamble remain optimistic about their 750-vehicle-giveaway promotion, Chevrolet dealers are returning mixed reviews.

Trolling for tourists 30
New England is attacking British TV; the South's bombarding German magazines. The U.S. invasion of overseas tourism markets has just begun. Prodded by the U.S. Travel and Tourism Administration, states are banding together to sell their regional attractions abroad.

Esty's independence day 34
William Esty Co. has received commitments from parent Saatchi & Saatchi Co. that the New York-based agency will be allowed to rebuild and remain independent, rather than be forced to merge with other Saatchi shops.

Battered Beber 36
Trouble is mounting at Beber Silverstein & Partners—one of the biggest agencies in the Southeast and, once, one of the hottest. The beleaguered shop this month lost its largest account, the $20 million in business for Austin Rover Cars' Sterling luxury auto.

Juice for adults 52
Del Monte USA is putting new punch behind its efforts to attract adults with $38 million in support for its new Fruit Blends line of blended fruit juices.

INTERNATIONAL

Nestle retrenches 60
Nestle, hard hit by the falling U.S. dollar and the collapse of world coffee prices last year, is hunkering down and planning no major acquisitions this year, says Managing Director Helmut Maucher. Although the company's profits increased 2.2% last year, sales were down 9.9% because of the falling dollar.

Canadian best seller 61
The proposed law banning all promotion of tobacco products in Canada has become a "best seller" for Health Minister Jake Epp. "We've had more demand for [copies of] this bill than any other that has come out of this ministry," said a spokesman for Mr. Epp.

OTHER NEWS

Ketchum Communications' triple play in the acquisition arena this month may not be its last. Page 34.

Ice cream, fruit and healthful foods dominated the news from the Food Marketing Institute's annual convention, where major food companies showcase new products. Page 41.

Wilkinson Sword USA's new owners are committed to expanding the company's personal-care lines, beginning with an entry in the $250 million U.S. shave-cream market. Page 52.

While Florida moves toward implementing a unique 5% sales tax on national advertising, nearby Louisiana appears to be the first state to consider taxing advertising as if it were personal property. Page 57.

Minnetonka Corp.'s decision to divest its Softsoap and other mass-market brands accelerates its transformation into a prestige-products marketer. Page 75.

American Greetings Corp. is making its long-expected entry into the "alternative" greeting-card market. Introduction of its 78th Street line, expected on shelves by mid-June, will coincide with a $10 million corporate image campaign. Page 100.

CBS will replace eight hours of prime-time programming with nine series and will drop movies on Tuesday and Saturday in the 1987-88 ratings battle. Page 101.

SPECIAL REPORT

***Direct marketing**—Business-to-business marketers are using direct marketing for lead generation, direct sales and account maintenance. Successful strategies require good lists, catchy and relevant direct mail and intelligent telemarketing.*

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Joan Rivers won't be the flag-waving symbol of Fox Broadcasting Co. anymore. Starting this week, a rotating group will host "The Late Show" and carry on Fox's quest to become the fourth network.

Guest hosts will replace Rivers at Fox

By WAYNE WALLEY

LOS ANGELES—Joan Rivers' departure last week as the host of Fox Broadcasting Co.'s "The Late Show" so far is not stalling the fledgling fourth network.

"People have been skeptical of Joan from the beginning, but she proved the show is viable and good counter-programming to local news," said Arnie Semsky, exec VP-media and programming services, BBDO Worldwide, New York. "In the long run, Fox may be better off with the new format, but they couldn't have launched this without her. Joan is a known quantity."

Fox intends to keep "The Late Show" on the air, most likely using guest hosts on a weekly or nightly basis.

"Media buyers will be antsy now, because they won't know who the host will be," said one agency executive. "With Joan, there was a track record.

"But if Fox will gamble and guarantee demographics, it could work. All I know is the Fox sales staff has to be reeling from this," the executive said.

Ms. Rivers and Fox are negotiating a settlement of her original three-year deal, which may include stints as one of the guest hosts. Fox hopes the rotating hosts will help improve national household ratings, which dropped to 2.1 for the week of April 27, according to A.C. Nielsen Co.

The turmoil comes just a year after Fox outlined its ambitious plans to create a new programming service to rival the Big 3 networks, but most observers believe the move will not harm Fox's image in the ad community as a fourth network.

With three hours of prime-time programming in place on Sunday and two hours set to premiere July 11 (not May 30 as previously planned), media buyers say they will continue to use Fox as a bargaining chip and possible alternative to the Big 3 for upfront buys in both prime time and late night.

"We'll have a very small impact on the marketplace," admits Fox Broadcasting Co. President-Chief Operating Officer Jamie Kellner. "But we're positioned underneath the other networks to be a more efficient buy for the advertiser."

Three weeks ago Fox quietly pulled its episodic tune-in advertising in-house from Chiat/Day, Los Angeles.

Fox expects to use Chiat/Day for special projects and program launches in the future. But Fox officials say they probably will hire a different media buyer and may consider either Independent Media Services, New York, which handles some media buying for Rupert Murdoch's News America, or JWT Entertainment, Los Angeles, the agency of record for 20th Century Fox Film Corp.#

On the acquisition trail

BBDO/West shops

SAN FRANCISCO—BBDO/West President Don Mitchum confirmed the agency is negotiating to purchase "one or two" undisclosed agencies here in the next few weeks.

"Our goal is to be one of the top 10 agencies in San Francisco," he said. The San Francisco office bills $15 million.

Vittel America will end its two-year relationship with the BBDO office Aug. 1, when it moves its $1.7 million account to Lewis & Partners. Vittel President Philippe Lecas said the move reflects the company's shift away from consumer media and toward sales promotion and trade advertising.

BBDO already has replaced a portion of the billings loss, picking up Sunnyvale-based Bonsu, a software marketer.

West Coast News

A-Plus Products, Beverly Hills, Calif., has named DDB Needham Worldwide, Los Angeles, first agency for Epilady, a new personal appliance designed to remove hair from women's legs. Budget estimated at $1 million.#

Werner joins Bloom

Dancin' raisin creator gets tall order

By SUSAN GARLAND

DALLAS—The Bloom Agency, the city's third-largest ad agency and 48th-largest nationwide, is changing character—in more ways then one.

Last week, the agency named Seth Werner, 32, president-executive creative director of the Dallas office, filling a post that had been vacant since December. Formerly a vice president with Foote, Cone & Belding, San Francisco, Mr. Werner on June 1 becomes the youngest person ever to head the shop's Dallas office.

While at FCB, Mr. Werner created the California Raisin Advisory Board's "I Heard It Through the Grapevine" TV campaign, one of the best-known and best-liked in the country, according to industry surveys.

He also created a campaign for Dial Corp.'s Imperial Leather soap, a test-market product, that was selected along with the animated (or claymation) raisins spots by ADVERTISING AGE as one of the "best" commercials of 1986 (AA, March 23).

Before joining FCB, Mr. Werner spent six years with Marschalk Co. (now Lowe Marschalk) in New York.

While there, he created the award-winning TV commercial for Stroh Brewery Co.'s Stroh's beer that featured Alex the Dog.

Mr. Werner has his work cut out for him in Dallas.

When Zale Corp., the nation's largest jewelry retailer, fired Bloom earlier this month (AA, May 11), it not only ended Bloom's more than 30 years as Zale Jeweler's ad agency but also marked a pivotal point in Bloom's evolution.

The Zale loss—to Saffer Advertising, Toronto—eliminated 15% to 20% of Bloom's billings here and effectively boosted the agency's New York operation to a more dominant position.

Staff photo by Arnold Adler

ROBERT BLOOM

Photo by Ken Vaughan

SETH WERNER

Bloom bills approximately $200 million; the New York office handles $60 million; and the Dallas office $140 (after the Zale loss).

Bloom has made no bones about wanting to avoid the "regional agency" designation. "We are not in any way a regional agency. We are national and we want to be perceived that way," said Robert Bloom, chairman of the agency's parent, Bloom Cos.

Zale generated about $25 million in billings in 1986.

Earlier this year, though, Zale cut its ad budget by more than one-third, prompting cutbacks and layoffs at the agency.

Zale is only the latest in a series of account losses for the Dallas office.

In 1986, Bloom in Dallas didn't win a major account that it was able to keep.

The $7 million Frontier Airlines account, landed in May, took off a short three months later when Frontier was acquired by People Express.

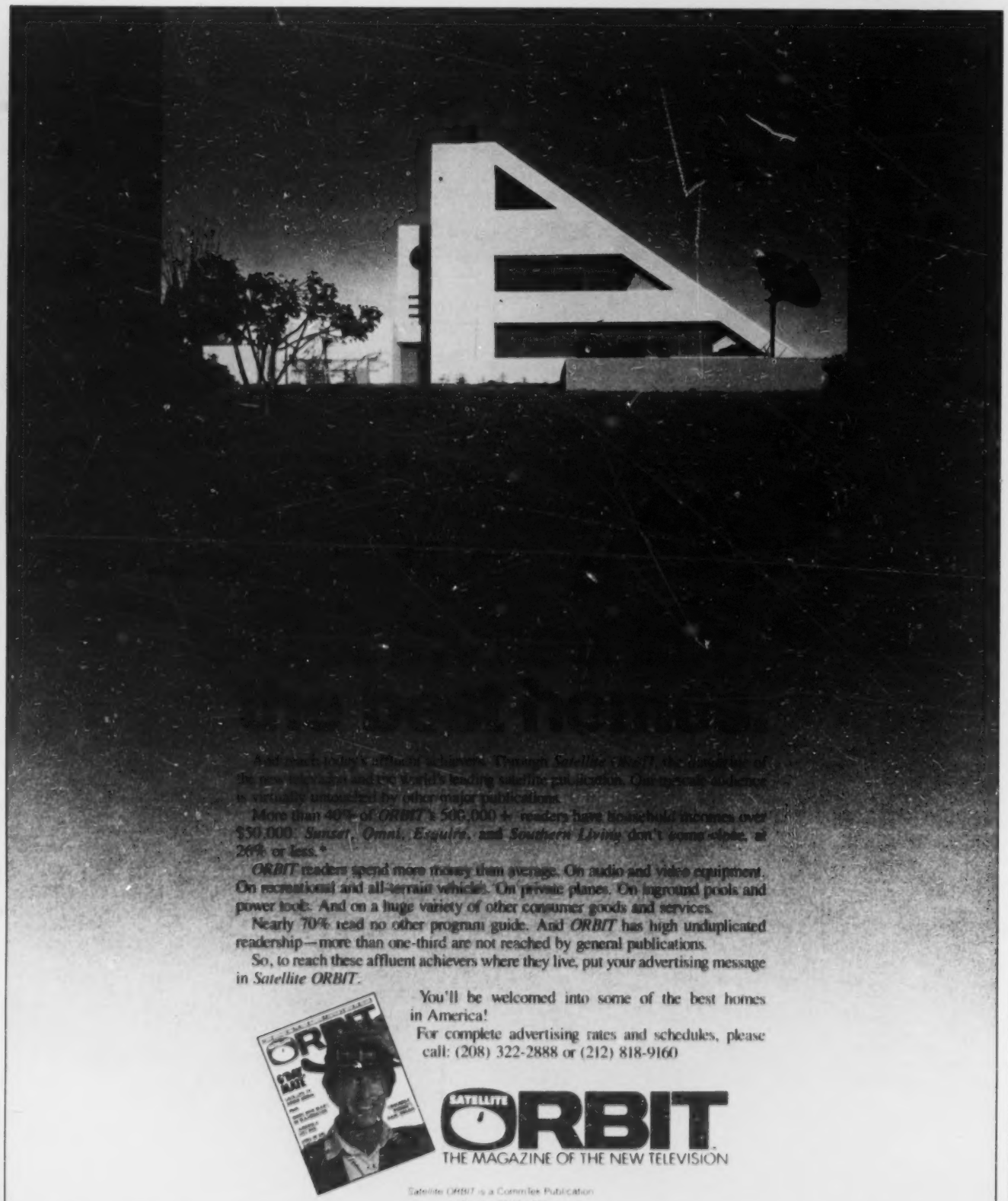
Both airlines now have been acquired by and merged into Continental Airlines.

St. Louis-based Anheuser-Busch awarded its Dewey Stevens Premium wine cooler in June, and then—apparently unhappy with the creative approach and its poor results—moved it to D'Arcy Masius Benton & Bowles in November.

Just a few weeks before Zale's departure, Schering-Plough's Memphis-based Maybelline division moved approximately $6 million to $10 million of its business to DDB Needham Worldwide, Chicago (AA, April 13).

Although it lost Moisture Whip

(Continued on Page 103)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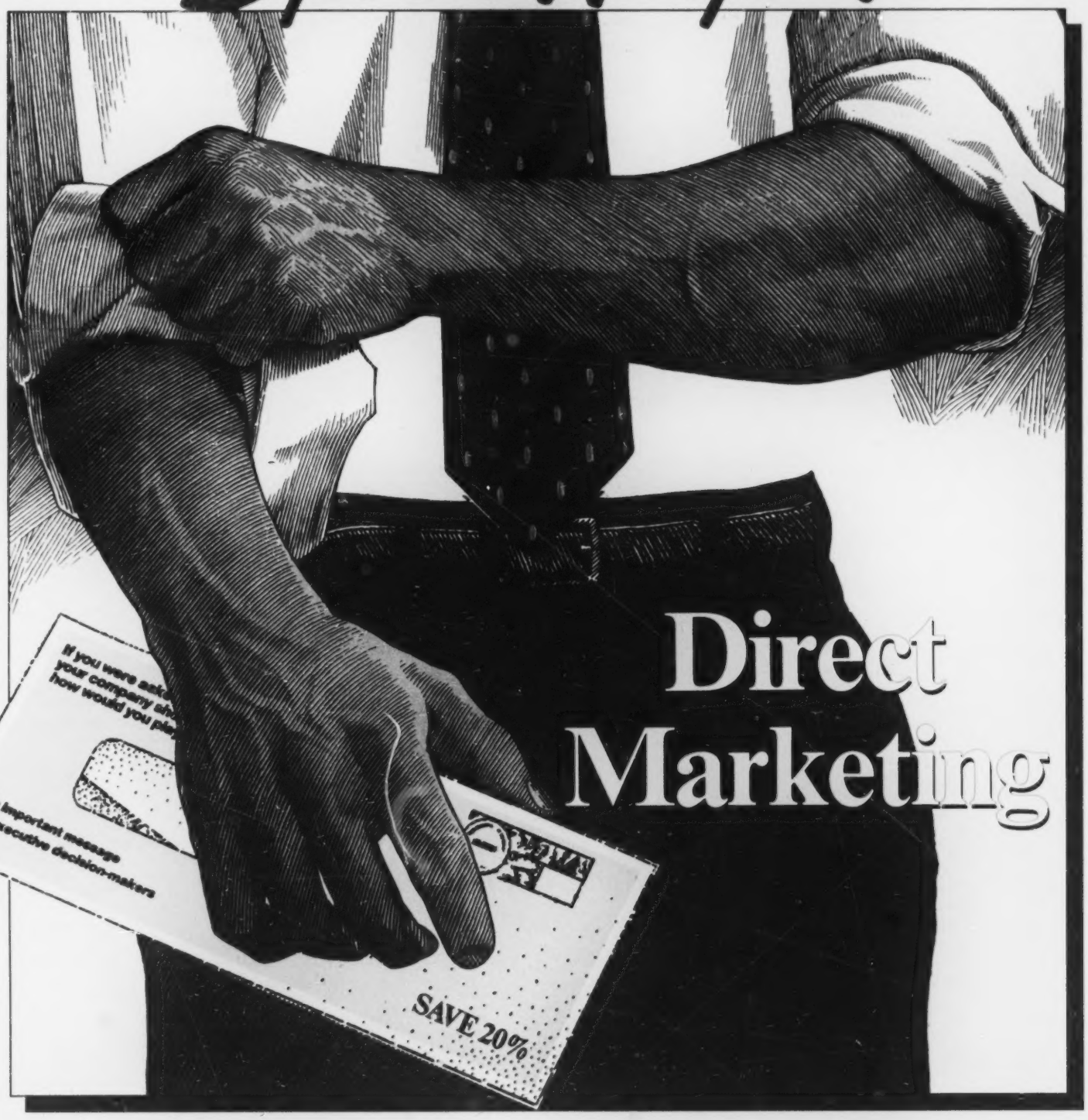
CORRECTIONS & CLARIFICATIONS

- An item about *Petersen's Pro Football* annual beginning to accept advertising from multiple sponsors (AA, April 6, P. 62), listed the ad rates incorrectly. A b&w page is $6,250 and a color page is $10,000.
- "Nation's Business Today" on ESPN is produced by BizNet for the U.S. Chamber of Commerce, not the *Journal of Commerce* (AA, May 4, P. 96).
- In the footnote for Lowe Marschalk Worldwide (AA, May 11, P. 60) Interpublic Group of Cos. was erroneously identified as holding 70% equity of LMW. This equity holding only applies to the Lowe Marschalk Worldwide office in New York.
- In a story about the *New York Daily News* (AA, May 11, P. 40), it incorrectly was reported that Macy's has been advertising in the paper less now than it did before its traditional competitor, Gimbels, closed last year. In fact, Macy's has increased the advertising it runs with the paper.#

Special Report



Mail, phone sell business-to-business

By Kevin Brown

I believe you can sell jet airplanes over the telephone," says Howard Berg, director of continuing product development & Data General/Direct at Westborough, Mass.-based Data General Corp.

Whether selling airplanes, computers, financial services or advertising, most business-to-business marketers strongly rely on direct marketing. "Mail is the primary medium to stimulate responses, whether that response is a phone call or a sale," Mr. Berg says.

Direct mail, telemarketing and direct selling through print ads all help businesses generate leads and build sales. To maintain existing accounts, direct marketers can home in on a client's needs for services, add-on equipment and even big-ticket items.

"We can sell a $30,000 disc drive in that environment," Mr. Berg says. A phone call and sometimes a sales call often close the sale.

"Without telemarketing, it just doesn't work," says Pam Lockard, president of Houston-based InterAct Communications. Telemarketing represents the lion's share of business-to-business direct-marketing expenditures.

Business-to-business DM strength

($ billions)

	Business-to-business expenditures*
Direct marketing	$30,850,000
Trade shows	21,000,000
Incentives	15,065,871
Advertising	8,589,371
Sales promotion	7,616,900
Sales force mgmt.	5,920,000
Public relations	2,405,300
Research	2,190,200
Total	**$93,637,642**

*Estimates represent annual advertising expenditures. Survey conducted during 1984-85. Source: *Business Marketing*, a Crain Communications publication

Of $93.64 billion spent on total business-to-business advertising and marketing, 32.9%, or $30.85 billion, went to direct marketing, according to a 1984-1985 study by Chicago-based *Business Marketing*, a Crain Communications Inc. publication. Nearly 90%, or $27.75 billion, was spent on telemarketing, the study found.

With that kind of money being spent, Ms. Lockard and Phyllis Libowsky, VP, found ample reason to establish InterAct in July 1986, during what Ms. Lockard calls "the bottom of Houston's economy for all time."

She thinks it was a good time to start a direct-marketing company because businesses in a declining market are more willing to fight for survival by trying areas like direct mail that they may have ignored when times were rosier.

(Continued on Page S-2)

Management responds

Percent of management personnel who bought via direct response or responded to an offer in the past 12 months

	Top mgmt.	Middle mgmt.	Technical mgmt.
Airline travel	38%	47%	41%
Office equipment	33	46	31
Office furniture	31	40	32
Credit cards	25	31	23
Computer software	34	44	51
Manufacturing materials and parts	31	45	45
Manufacturing machinery and equipment	31	41	48
Courses via video or audio cassettes	17	25	28

Source: Ogilvy & Mather Direct

Business-to-business

(Continued from Page S-1)

"The hardest people to convince are the ones who don't understand direct selling and have never really been in it," Ms. Lockard says.

To build clientele and convert marketers, InterAct spent about $15,000 on a campaign to reach potential direct-marketing spenders in Houston, particularly among financial services companies. The mailing, to 3,000 prospective clients, 400 of whom received kaleidocycles (spiffy hand-held cardboard toys comparable to worry beads, but designed to capture attention), achieved a 15% response rate. To date the company has billed $200,000, and the campaign is continuing.

Many response cards were returned by someone other than the addressee, indicating a successful campaign because "the mailing got noticed and didn't get thrown away," Ms. Lockard says.

"I made an impression in the beginning. I call them six months later and say, 'I'm the one who sent you the gadget,' and they talk to me."

InterAct's campaign illustrated lead generation to potential clients. "I used my pieces as part of an educational process to make local marketers understand what lead generation is and does," she says.

Lead generation through business-to-business direct marketing helps solve a problem faced by all marketers with heavy sales-force orientation: The cost of a cold sales call is approaching a hefty $300 a shot. But generating the lead is only the first step.

"In business to business you have a long time close," Ms. Lockard says. "The campaign's not over by a long shot. I have several more steps before I'll give up on potential clients."

Business people are conditioned not to buy on the first sales pitch, Ms. Lockard says. She says that unlike consumer direct marketing, where a single piece is expected to reach the decision maker and make the sale, business-to-business campaigns are more complex. The *BM* study confirms this, explaining that 83% of businesses "use direct-response media with some degree of sophistication as part of their marketing mix."

"A lot of the same principles are at work as with consumer direct response," says Bob Dinsea, general manager at Chicago-based Kobs & Brady. "It's not a different discipline, it's just applied in a different way."

One difference is in the mailing lists, which the *BM* study says number more than 10,000. Business-to-business direct marketers must contend with turnover and varying job descriptions and responsibilities.

Even with a good business mailing list—which in many industries is hard to find—a direct-mail piece will have to pass through a secretary and maybe another layer before reaching the decision maker.

Secretaries open mail for 58% of top managers and 49% of middle managers, according to a 1985 study, "There's No Business Like Business to Business," conducted by New York-based Ogilvy & Mather Direct. And of those, half also have their secretaries screen mail.

"To hit a CEO you may have to use four color to really make

(Continued on Page S-4)

"WHAT A DIFFERENCE ONE CALL CAN MAKE!"

"It's frightening to think how much can depend on one phone call. Just one phone call, for example, can put you in touch with Floridata, Inc., the one-source, full service direct mail advertising company. I wish / had called them when the boss told me I was going to be in charge of the next mailing. I must have called a hundred different service companies, and wound up having to work with six of them. In six different states. Just imagine what a nightmare it was trying to coordinate all that and you'll understand what happened to my hair. Copywriting here, laser printing there, typesetting somewhere else, printers, list brokers, letter shop–why didn't someone *tell* me Floridata handles all of that for you. And a lot more–computer processing, color printing, full creative services. And as a result of Florida's lower labor costs, Floridata can maintain its commitment to the very highest professional quality in each of its specialty areas. I could have enjoyed savings unprecedented in the industry. I could still have my job! *And* my hair. But you're lucky. You found this ad. You can do what I should have done, and what hundreds of smart direct marketers across the country do–send for Floridata's **FREE** catalog. Or just give Floridata a call today."

800-882-5323 National WATS **800-255-5323** Florida WATS **305-576-5323** Miami

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Please send **FREE** Floridata Catalog.

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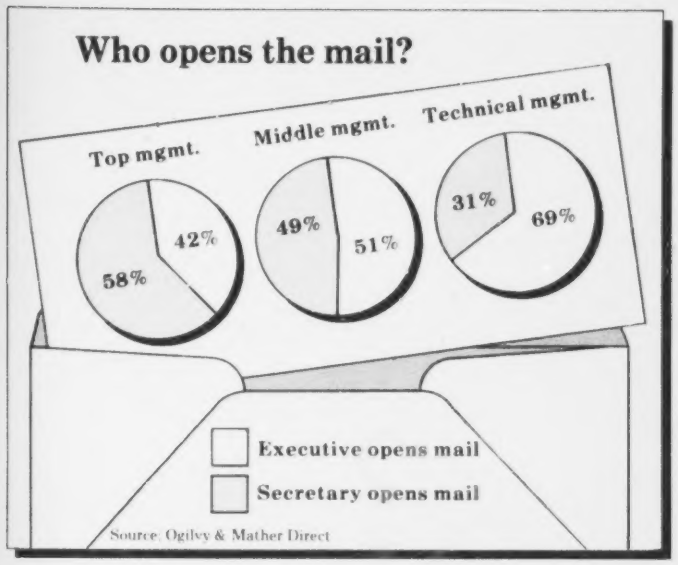

Business

(Continued from Page S-2)

it pop," says Mr. Dinsea.

InterAct's kaleidocycles cost about $5 apiece and had to be assembled by hand, but Ms. Lockard notes: "What dictates how much you can spend ... is how much that customer will be worth in the long run."

Whether using four-color, black & white or three-dimensional objects like the kaleidocycle, the trick is to involve the reader with comprehensive and relevant information, says James Graves, account supervisor at O&M Direct.

"Each situation has its own set of economics," he says. "3D is a quality direct marketing can have over over print or broadcast. It's something you can hold in your hand and spend time with."

To get small businesses involved with a direct-mail piece on financial services, O&M Direct used humor, enclosed a poster and offered recipients a free incentive. The mailing, created for Minneapolis-based IDS Financial Services, a unit of American Express Co., was sent to 900,000 small business executives who hold American Express Corporate Cards to generate leads for IDS Financial Planning Services.

O&M Direct conducted research through focus groups and discovered small businesses were drastically underserved by the financial services market.

Two lead generation and two fulfillment mailings were sent out. Although the companies won't release the response rate, Mr. Graves says it was double the expectations in the campaign.

An O&M Direct mailing for IDS included an insert called "A Bagful Of Gripes."

The mailing's hook was an insert called "A Bagful Of Gripes" —a bag of 4½-inch by 2¾-inch cards featuring *The New Yorker*-style illustrations of employee complaints such as, "Management treats us like children" and "They don't care about us."

"Reading all the cards is involving," says Mr. Graves. "We hoped the entertainment value would lead to higher readership of the whole package."

The mailing also had the advantage of coming from a respected company. "We were marketing to American Express Corporate Card members," says Mr. Graves. "Some were enthusiastically happy. These are people happy with American Express."

The image, not only of the mailing but of the company sending the mailing, is a factor in response. According to the O&M study, 90% of respondents said they would respond to more offers from companies they could trust and 80% said they would be more likely to repond to offers from well-known companies.

"The credibility of the company offering the service is important to the client," says Mr. Graves. But he adds, "Experience is the thing you want to sell."

Indeed, Ms. Lockard says a client told her: "I wouldn't have to be as impressed by O&M as I was by InterAct to be sold." They can ride a bit on their reputation, she says.

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John Francis Tighe says

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The Tighe Team

Three direct sellers run the office party

By Len Strazewski

Pens, paper, desks, chairs and wastebaskets remain the flotsam and jetsam of business operations.

Compared with gleaming office towers, sprawling industrial parks and multimillion-dollar mainframe computer centers, office products seem practically inconsequential, yet, according to the Alexandria, Va.-based National Office Products Assn., office products are a more than $60 billion industry, expected to top $87 billion by 1989.

Len Strazewski is a Chicago-based free-lance writer.

Though most office products are marketed by dealers as part of the traditional manufacturer-wholesaler-retailer chain of distribution, a growing portion of these items is being sold by aggressive direct mail, using the latest in catalog marketing and mailing-list manipulation, and targeting America's fastest-growing business niche—small and medium-size businesses.

In 1984, the most recent year statistics are available, about 8% of office supplies, 6% of office furniture, 8% of office machines and 4% of office microcomputers were sold via direct-mail, according to NOPA. By 1989, the association predicts 11% of office supplies, 7% of office furniture, 8% of office machines and 4% of microcomputers will be sold by direct mail. Microcomputer sales by office products companies remain flat because of the growing number of computer specialists.

Though some of the direct-mail portion of the business is conducted by small entrepreneurs taking advantage of bulk buys and overstock sales, three large companies dominate the regular catalog-based direct mail business: Quill Corp., Reliable Office Supplies and Viking Office Products.

The largest of the group is Lincolnshire, Ill.-based Quill, a 30-year-old family business started in 1956 by President Jack Miller in the back of his father's chicken store on the North Side of Chicago and moved a year later to a 500 square foot coal bin in the basement of an uncle's two-flat apartment building.

Mr. Miller and his two brothers (one of whom joined the company during the move into the coal bin location) have since seen the company outgrow several locations until it moved into its present location—377,000 square feet of office and warehouse space, believed by the company to be the largest independent office-products distribution center in the country.

As the space has grown, so has the company's direct marketing.

(Continued on Page S-20)

TeleCable

(Continued from Page S-14)

cable or VCR hookup—worth up to $20 for the consumer—with each TV or VCR purchased at the shop.

Some 363 retailers, or 77% of those targeted, agreed to participate in the program. "Participation" mostly involved placing POP materials on their counters; "This is the kind of deal that didn't really cost the retailer anything, but he comes out looking like a great guy," Mr. Barker says.

TeleCable ads involved tie-ins with electronics retailers.

Participating retailers were listed in radio and newspaper ads run by TeleCable in December and January in the company's 22 markets.

In stores "that would let us," Mr. Delatte says—or about one-third of the retailers—TeleCable also conducted in-store workshops to teach employees the basics of hooking up cable descrambler boxes with VCRs and TV sets. In addition, the company provided booklets for retailers to give to consumers.

Mr. Delatte says TeleCable doesn't know how many cable or VCR hookups were provided as a result of the offer, which was available from Dec. 1 through Jan. 31.

"The installation numbers were not key for us—the key was placing those pieces at retail level," Mr. Delatte says. "And on that level, the program was a smash.

"Retailers were happy because it not only helped to sell VCRs and TVs, but it helped to sell faster," he says.

TeleCable plans to make further use of its new connection with local retailers. Mr. Delatte says another campaign, again directed at retailers, is in the works and probably will break in about six to eight weeks.

"This time, we'll be promoting our investment in MTS stereo sound, to consumers with or considering buying stereo TV sets," he says.

Terry C. Gillette,
President and Founder of
The Company Store

Terry C. Gillette On Catalog Marketing

I wasn't asked to write this endorsement— I volunteered the idea. It's my way of saying thank you to a closely-knit group of people doing business under the name of Ovation Marketing.

Ovation is an advertising and marketing agency that works with me, within my budget and schedule requirements, to produce a catalog that conveys my company's image and message. If you're searching for a close client/agency relationship, this is the company to team up with.

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The direct marketing professionals at Ovation have an exceptional understanding of direct mail. They know the strengths of my company, its products, its people. They take the time to find out exactly who my customers are, and why they buy from The Company Store. Then they create a catalog that's successful not because it wins awards for art directors, but because it sells my products. . . lots of products.

The creative team at Ovation also develops space advertising that sells products right off the page and generates high-quality catalog requests that out perform most rental lists. With Ovation's help, we've built a house list of over one million people that ranks among the finest in the industry (all in just five years).

So there you have it. A description of how Ovation Marketing contributed to the success of The Company Store— and how they have won my loyalty. Give Ovation a call at **1-800-722-1002, Ext. 20** . . . and let them win yours.

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Office party

(Continued from Page S-19)

Mr. Miller recalls that his first mailing was a simple postal card on which he listed five "specials," and the first full catalog wasn't mailed until 1963. Today, Quill mails more than 45 million catalogs and flyers to a customer base of more than 600,000 businesses and organizations, listing about 9,500 office products.

Quill has grown to more than 850 employees, generating annual sales of more than $185 million, according to estimates from outside the company.

"Our creative presentation has improved and changed a lot over the years, but the message is still the same," Mr. Miller explains. "Price, service and quality.

"Quill is still very much a price house. Our marketing depends upon keeping prices low, and we are willing to go into battle with competitors to maintain price leadership," he says.

Discounts from retail pricing range from 15% to 60%, depending upon the season and competition. Quill mails a semi-annual comprehensive catalog in which prices dominate the presentation, but regular Quill customers know that if they can wait awhile, the products will show up more heavily discounted in one of the regular monthly flyers—priced as "barnburners" or other excitement-generating "hot" items.

Mr. Miller says that the frequent discounting is essential to keeping customers that generally have little loyalty to suppliers. "You've just got to keep mailing," he says.

However, while price may be what attracts customers, the quickest way to repel customers is by offering poor service or low-quality merchandise, he adds.

"There's plenty of ways to lose customers, and service and quality are two very quick ways to lose them. You've got to deliver exactly what people order and you've got to deliver it quickly. Most of Quill's customers are small to medium-sized businesses that order supplies when they need them, so it is essential that they receive their order immediately.

"If you want to succeed in this business, you've got to show up on time," he says.

A director of the Washington-based Direct Marketing Assn., Mr. Miller has become one of the business-to-business marketing industry's chief representatives and is implementing some of the state-of-the art marketing tools discussed in seminars. Quill is experimenting with telemarketing for some specialty products (such as microcomputer equipment) and is developing database marketing capabilities to enhance its use of the "hundreds of thousands of dollars" of prospect lists the company acquires every year.

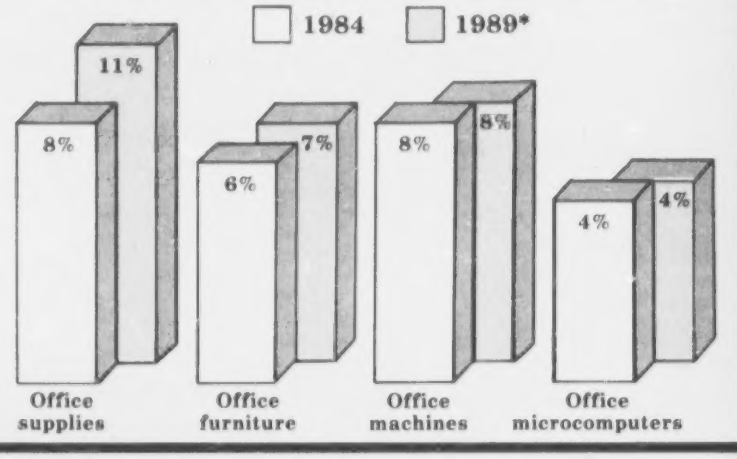
"By using sophisticated database information, it is possible to allow customers to see exactly what they want to see in products—to practically tailor a catalog or a mailing to an individual. With tools like these, the potential for growth is huge," he says.

Though NOPA predicts small but steady growth in direct marketing, Mr. Miller notes that Quill has grown at 15% to 20% a year for the last five years and expects the pace to continue. To boost that growth, Quill also is experimenting with selected advertising in such business publications as the *Wall Street Journal*. Kobs & Brady manages an undisclosed media budget. Direct-mail creative advertising is

(Continued on Page S-22)

Mail order supplies office needs

Percent of office supplies sold by direct mail



*Estimate
Source: National Office Products Assn.

We helped The Boston Company customers cash in on a new card.

Roberta G. Sydney
Vice President
Boston Safe Deposit and Trust Company

"To promote our new Boston Cash Card, we contacted preferred customers by mail and followed up the mailing with telephone solicitation.

"We decided to use WATS MARKETING Outbound to make the sales calls. After looking at several telemarketing firms, I chose WATS because of their size, professionalism and capabilities.

"After the first 200-hour test, we gave them the go ahead. Within 10 days they contacted thousands of people for a 35% response rate.

"I'd use WATS MARKETING Outbound again because I know if we needed 100,000 phone calls tomorrow, they could do it."

Helping clients reach marketing objectives. That's our goal at WATS MARKETING Outbound. No one has more experience and no one gets results like we do.

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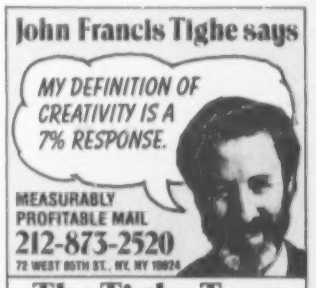

The Tighe Team

Three run the office party

(Continued from Page S-20)
handled in-house.

Quill's strongest competitor in the Midwest is Chicago-based Reliable Office Products, but unlike Quill, Reliable did not jump right into direct marketing. The company started as a traditional contract-sales supplier with a large sales staff that made the rounds from customer to customer. In the 1960s, the company started mailing a catalog to its smaller customers and in 10 years saw the mix of its business change from mostly sales staff-based to 75% direct mail.

In 1983, the company moved into direct mail full time and sold the remainder of its contract business to Publix Office Supplies, a local contract dealer.

Reliable sends more than 30 million mailings a year to more than 400,000 customers, with catalog updates and sales flyers going out monthly to both regular customers and prospects generated by regularly updated rented lists. The catalog features more than 5,000 products.

Reliable estimates 1987 sales at $100 million, a 30% increase from 1986. The office is in a 350,000 square foot complex in Chicago's West Loop; there are about 400 employees.

The key to Reliable's fast growth (34% each year for the past two years) hasn't been fancy marketing techniques, just steady development, according to President John Quinton.

"You can't be a mail-order success overnight," he explains. "It's a long road and not an easy job. Repeat. Repeat. Repeat. That's the only way to get the attention of the customer."

Unlike Quill's Mr. Miller, Mr. Quinton believes that business-to-business direct-mail customers do develop certain loyalties to suppliers, but he agrees that price and service are what builds that loyalty.

"In the business-to-business marketing area, service is very important, and by service, I mean turnaround time," he says. "Our customers are smaller and medium-sized businesses and don't have the huge resources of larger firms. When they are out of copier paper, they can't use the copier. It's that simple. So we have to process orders fast. Most orders are shipped within eight hours."

Although Reliable has done little media advertising to promote its catalogs, the company is researching the possibility of using advertising to expand its customer base. Direct Marketing Specialties, Chicago, is handing the research.

"The problem is what media is appropriate?" Mr. Quinton says. "Most publications are not aimed at our marketplace and

Direct-mail catalogs are the life blood for Reliable Office Supplies, Viking Office Products and Quill Corp.

A list of top that don't us

There are a lot of companies and agencies you *won't* find on this list. Companies like Lever Brothers, Christian Dior, Revlon, Chrysler, Mc Donald's, Sears & Roebuck and hundreds more. And agencies like Grey, Jaffee Young & Rubicam, Mc Cann-Erickson, and hundreds more.

In fact, you may be surprised to see the array of Webcraft clients. It may well represent the cognoscenti (and the up-and-coming) marketers in the U.S. today. And there are very good reasons why these leading advertisers depend upon Webcraft Technologies.

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Indeed, if you're one of them, give Bill Williamson a call at 1-201-297-5100. When you've talked with us and have seen our facilities *and our work*, you'll want off the list, too.

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INBOUND EXT. 2003
OUTBOUND EXT. 660

the people who actually purchase office products in their companies."

Reliable, however, is looking to move beyond the business-to-business base and in February mailed its first consumer-oriented catalog, called "Home-Office," to 250,000 rented names. The 36-page four-color catalog had a response rate of 1.5% in tests with an average order of $40 to $50.

Though the consumer catalog features many of the same products as the business-to-business catalog, many products are different and offered in more colors or more modern styles.

"When people come home, they want to leave their offices behind," Mr. Quinton says. "They may be working, but they want a more fashionable, colorful environment, so we are offering products that have a little more color and style."

Mr. Quinton says results were good enough to order a new consumer catalog for a fall mailing.

Reliable estimates that more than 27 million people conduct some business from their home and need office products, a fertile market that has been relatively untapped by office-product direct marketers.

On the West Coast, Los Angeles-based Viking Office Products commands a strong presence in the direct-mail business-to-business market for office supplies. Though most of the 27-year-old company's tactics are similar to its two major competitors—more than 20 million mailings annually to more than 300,000 customers—Viking takes a more personal approach to its presentation. Each mailer features President Irwin Helford demonstrating products and commenting directly to customers on price and quality.

The personal touch has been effective, says Mr. Helford, who joined Viking in 1984 after a 23-year career at Reliable.

"The concept is very simple. Customers prefer to buy from a person and though it wasn't originally my idea, I'm that person. It's been very effective and I get calls and letters from customers all the time and when they require an answer, I do answer them personally," he says.

Viking, however, is far from the small company that might be expected to maintain such a personal touch. Mr. Helford would not disclose annual sales, but the company has more than 400 employees and branch distribution centers in Dallas and Cincinnati.

However, Mr. Helford sees as his mandate the job of providing his small-to-medium-size business customers the pricing advantages usually garnered by bigger buyers with the attention of a smaller business.

He agrees with executives from both Quill and Reliable that service and price remain paramount and that speed and efficiency count for much in the business-to-business market.

"You need to sell good quality products and ship exactly what you offer—no substitutions and no shorting of orders. And you've got to keep a steady flow of new products available, things that match the changing needs of your customers," he says.

Marketing must remain steady, with regular mailings and sales, Mr. Helford says. Though Viking does no media advertising, the company continues to experiment with other direct-marketing techniques, including mail-response card decks, telemarketing, package inserts and trying new lists on a regular basis.

With effective marketing, Mr. Helford expects the direct-mail portion of the office-products business to grow significantly—probably more than the few percentage points predicted by NOPA.

"For companies like Quill, Reliable and ourselves, people who market professionally and know what they are doing in the office-products business, I see growth being very substantial. It's a question of knowing what the users want and delivering it in a professional manner," he says.

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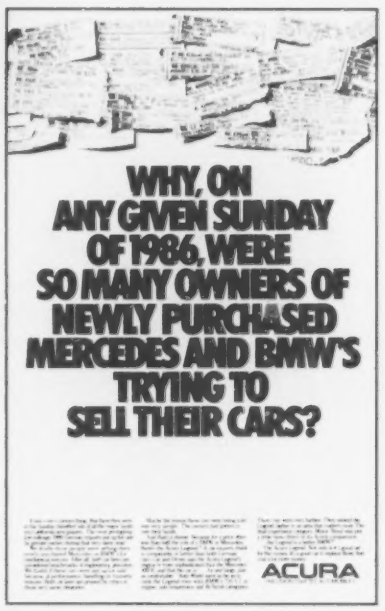
BEST OF PRESS

The front and back pages of this Procter & Gamble Co. four-page special ad section in *USA Today* are excellent examples of creating a message to fit the medium. While the format of the section works well with the newspaper's format, it's not a direct rip-off, like oh-so-many other special ad sections that try to palm themselves off as news copy. This section was done by Wolf Blumberg Krody, Cincinnati, in association with Saatchi & Saatchi Compton, New York, the agency of record. Creative director: Ron Harley; copywriter: Judy Benson Findsen; art directors: Keith Bollmer, Willie Hillenbrand; illustrators: Willie Hillenbrand, David Sheldon.

A unique illustration gets the point across with a minimum of copy in this ad for First Federal of La Crosse (Wis.), via Clarity Coverdale Rueff, Minneapolis. Creative director: Jac Coverdale; art director: David Fox; copywriter: Jerry Fury; photographer: Rick Dublin.



A good headline and a good illustration make this ad for Acura, from Mendelsohn/Zien Advertising, Los Angeles, a standout. The use of the newspaper classified ads as an illustrative device is another example of tailoring the ad to fit the medium. Creative director and art director: Jordin Mendelsohn; copywriter: Perrin Lam; photographer: Jay Ahrend.

Best of Press selections are made by a committee of three: Hank Simons, VP-creative director at the Newspaper Advertising Bureau; James Dunaway, VP-information, Newspaper Advertising Bureau; and William F. Gloede, Advertising Age's newspaper industry reporter. National System Inc., St. Louis, provides tear sheets to the NAB for much of this work. Advertising agencies, clients and newspapers are invited to submit newspaper ads for review. Submissions should be sent to Mr. Gloede in AA's New York bureau.

FLASH REPORT: Newspaper advertising investment for February

February 1987	IN 100 THOUSANDS IN MILLIONS	DOLLARS		CHANGE	
CATEGORIES	YEAR	1987	1986	ACTUAL $ G OR L	% G OR L
Amusements	1987	$31,653,592	$28,763,953	+2,889,639	+10.0
	1986				
Computer stores & supplies	1987	4,638,521	4,098,857	+539,664	+13.2
	1986				
Department stores	1987	78,591,430	78,413,956	+177,474	+0.2
	1986				
Food stores	1987	30,973,626	27,021,007	+3,952,619	+14.6
	1986				
Radio, tv, phonographs, records	1987	19,148,465	19,103,840	+44,625	+0.2
	1986				
General merchandise stores	1987	34,431,002	28,635,693	+5,795,309	+20.2
	1986				
Alcoholic beverages	1987	915,670	1,356,304	-440,634	-32.5
	1986				
Cameras, photo supplies & services	1987	58,071	178,467	-120,396	-67.5
	1986				
Computers, equipment & services	1987	451,522	1,386,676	-935,154	-67.4
	1986				
Public service utilities & communications	1987	4,318,890	4,537,849	-218,959	-4.8
	1986				
Publishing & media	1987	13,451,767	15,451,725	-1,999,958	-12.9
	1986				
Cigarettes	1987	2,137,224	2,940,689	-803,465	-27.3
	1986				
Airlines	1987	17,051,098	13,494,589	+3,556,509	+26.4
	1986				
Passenger cars-new	1987	23,639,790	17,870,201	+5,769,589	+32.3
	1986				
Banks & trust companies	1987	8,430,647	7,658,942	+771,705	+10.1
	1986				
Stock, bond & investment houses	1987	2,460,553	1,773,045	+687,508	+38.8
	1986				

This Flash Report of newspaper advertiser investments, compiled for Advertising Age by Media Records, is derived from tabulations that cover 29 dailies and 23 Sunday editions in 15 cities: Atlanta, Baltimore, Boston, Cincinnati, Chicago, Cleveland, Dallas, Denver, Detroit, Los Angeles, New York, Philadelphia, San Francisco, Washington and Youngstown.#

Source: Media Records Inc.

Ad spending gain nears 9%

New York—Advertising investments in February in major-market daily newspapers in 16 key categories increased 8.7% over year-ago levels to a total of $272.3 million, according to the Advertising Age Flash Report prepared by Media Records Inc.

The new-car and general-merchandise advertising categories posted the biggest gains, with the former jumping 32.3% to $23.6 million and general-merchandise stores up 20.2% to $34.4 million. Airlines advertising also was up a strong 26.4% to $17 million.

Other gainers included amusements, up 10% to $31.7 million, food stores, up 14.6% to $31 million; banks and trust companies, up 10.1% to $8.4 million; computer stores and supplies, up 13.2% to $4.6 million; and stock, bond and investment houses, up 38.8% to $2.5 million.

The department stores category, the largest in terms of dollar volume, was essentially flat, posting a 0.2% gain to $78.6 million, as was the radio-TV-phonographs-records category, with a 0.2% gain to $19.2 million.

Losing categories included publishing and media, down 12.9% to $13.5 million; public service utilities and commissions, down 4.8% to $4.3 million; cigarettes, down 27.3% to $2.1 million; alcoholic beverages, down 32.5% to $915,670; computers, equipment and services, down 67.4% to $451,522; and cameras, photo supplies and services, down 67.5% to $58,071. The Flash Report is based on Standard Advertising Unit inch measurements in 27 daily and 23 Sunday newspapers in 15 top markets.#

Merit beats the tar out of Kent.
MERIT
Filter
KENT
In actual taste tests, Merit tasted just as good as Kent, but with less tar.
In fact, we've got 33% less tar than they do.
If you're smoking Kent, why not switch to Merit. The only thing you'll be giving up is a third of the tar.
LOW TAR. ENRICHED FLAVOR
Merit. We've got flavor down to a science.

This ad for Philip Morris USA's Merit cigarettes, via Leo Burnett USA, Chicago, uses a good competitive headline and a dominant illustration to make the point that Merit has a lower tar rating than Lorillard's Kent Kings. Creative director and copywriter: Martin Dawson; art director: Guerin Rife; copywriter: Steve Allen; photographer: Carl Corey.

Best, 'Barr' none

ANDY tosses praise to Chiat for Pizza Hut

NEW YORK—Chiat/Day led the pack of winners this month at the Advertising Club of New York's ANDY Awards.

The agency grabbed seven awards of excellence and the "Best of Show" (AA, May 11).

At the 23rd annual awards presentation at the Marriott Marquis, Chiat/Day took "Best of Show" for a Pizza Hut TV spot entitled "Salad Bar."

The TV spot featured Roseanne Barr, a housewife-turned-comedian.

The commercial, which was created by the agency's Los Angeles office, also won four "distinction" honors.

Chiat/Day's Los Angeles shop also won three "excellence" prizes (for Apple Computer, Pizza Hut and Mitsubishi Electric Sales America); its New York branch collected three (two for Ricoh and one for an ad for the agency itself); and San Francisco added one (Brown-Forman's California Cooler).

The agency also won a total of 16 "distinction" prizes.

A panel of 160 judges picked winners for a total of 68 awards of excellence and 334 awards of distinction.

Foote, Cone & Belding amassed four "excellence" awards through its Los Angeles, San Francisco and Toronto branches, and FCB/Leber Katz Partners, New York.

Other big winners, landing three "excellence" awards each, were BBDO Worldwide, New York; Hal Riney & Partners, San Francisco; Hill, Holliday, Connors, Cosmopulos, Boston; Levine, Huntley, Schmidt & Beaver, New York; Lowe Marschalk, New York; and Ogilvy & Mather, New York.

Pepsi-Cola accounted for two of BBDO's awards, E&J Gallo Winery for two of Riney's, California Raisin Advisory Board for two of FCB/San Francisco's and Gillette Co. for two of Lowe Marschalk's.

Chiat/Day's award-winning spot promoted Pizza Hut's salad bar with irreverent input from Roseanne Barr, a housewife-turned-comedian.

The more than 500 attendees saw not only winning commercials but also five original musical numbers, created and produced by Jed and Douglas Bernstein. The former is VP-management supervisor on the Seagram account at O&M; the latter is a composer, author and actor.

Their tunes included "Like a Merger," a tribute to the biggest news story of 1986, and "Nothing But the Blame," dubbed "a creative lament."

Looking ahead a year, Steve Frankfurt, vice chairman-chief creative officer at Bozell, Jacobs, Kenyon & Eckhardt, was named honorary chairman of the 1988 ANDY Awards competition, succeeding Norman Berry, chairman-ceo at O&M.#

U.S. advertising volume

The McCann-Erickson U.S. advertising volume reports represent all expenditures by U.S. advertisers—national, local, private individuals, etc. The expenditures, by medium, include all commissions as well as the art, mechanical and production expenses which are part of advertisers' budgets for each medium. *Source:* Prepared for Advertising Age by Robert J. Coen, McCann-Erickson

Medium	1985 Millions of dollars	1985 Percent of total	1986 Millions of dollars	1986 Percent of total	Percent change
Newspapers					
National	3,352	3.5	3,376	3.3	+ 0.7
Local	21,818	23.0	23,614	23.1	+ 8.2
Total	25,170	26.5	26,990	26.4	+ 7.2
Magazines					
Weeklies	2,297	2.4	2,327	2.3	+ 1.3
Women's	1,294	1.4	1,376	1.3	+ 6.3
Monthlies	1,564	1.6	1,614	1.6	+ 3.2
Total	5,155	5.4	5,317	5.2	+ 3.1
Farm publications	186	0.2	192	0.2	+ 3.0
Television					
Network	8,285	8.8	8,570	8.4	+ 3.4
Spot	6,004	6.3	6,570	6.4	+ 9.4
Cable (national)	637	0.7	752	0.7	+18.1
Local	5,714	6.0	6,514	6.4	+14.0
Cable (local)	130	0.1	179	0.2	+37.8
Total	20,770	21.9	22,585	22.1	+ 8.7
Radio					
Network	365	0.4	423	0.4	+16.0
Spot	1,335	1.4	1,348	1.3	+ 1.0
Local	4,790	5.1	5,178	5.1	+ 8.1
Total	6,490	6.9	6,949	6.8	+ 7.1
Direct mail	15,500	16.4	17,145	16.8	+10.6
Business papers	2,375	2.5	2,382	2.3	+ 0.3
Outdoor					
National	610	0.6	600	0.6	- 1.5
Local	335	0.4	385	0.4	+14.9
Total	945	1.0	985	1.0	+ 4.4
Miscellaneous					
National	9,551	10.1	10,175	10.0	+ 6.6
Local	8,608	9.1	9,420	9.2	+ 9.4
Total	18,159	19.2	19,595	19.2	+ 7.8
Total					
National	53,355	56.3	56,850	55.7	+ 6.6
Local	41,395	43.7	45,290	44.3	+ 9.4
Grand total	94,750	100.0	102,140	100.0	+ 7.8

Financial planning campaign breaks June 2

ATLANTA—The International Association for Financial Planning on June 2 breaks a national campaign to promote financial planning. The campaign, which includes publicity, special events and promotions, was created by D-A-Y Public Relations, New York.#

This announcement is neither an offer to sell nor a solicitation of an offer to buy these securities. The offer is made only by the Prospectus.

May 7, 1987

1,700,000 Shares

MARKITSTAR INC.

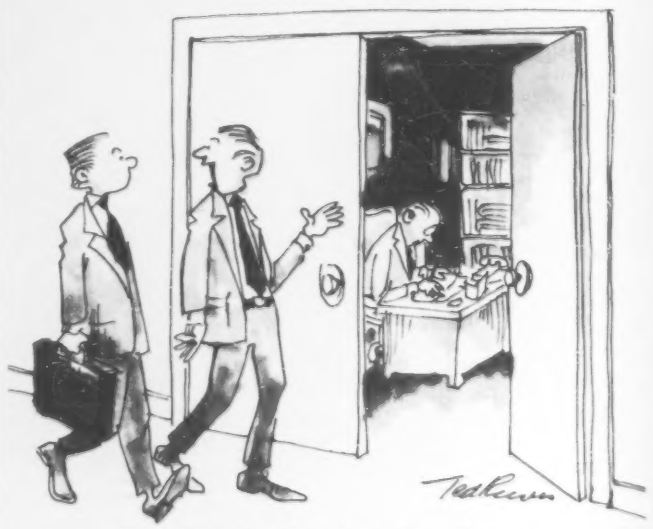
Common Stock

Price $4.50 Per Share

Copies of the Prospectus may be obtained in any State in which this announcement is circulated only from such of the undersigned as may legally offer these securities in such State.

Woolcott & Co., Inc.

Drexel Burnham Lambert Incorporated
L. F. Rothschild, Unterberg, Towbin, Inc.
Banque Industrielle et Commerciale du Marais
The Chicago Corporation
Furman Selz Mager Dietz & Birney Incorporated
Howard, Weil, Labouisse, Friedrichs Incorporated
Ladenburg, Thalmann & Co. Inc.
McLeod Young Weir Incorporated
Morgan, Olmstead, Kennedy & Gardner Incorporated
Piper, Jaffray & Hopwood Incorporated
Tucker, Anthony & R. L. Day, Inc.



"He's from the old school. He still thinks that the important people in Orange County read Los Angeles newspapers"

The Register reaches more people in Orange County households earning over $50,000 than any other newspaper. More than half read no other newspaper. (Source: Simmons Scarborough)

THE ORANGE COUNTY Register METROGROUP

The leading medium in Southern California's richest market. Represented by CWO&O

Consumer Magazine Ad Linage

Advertising pages for U.S., Canadian and foreign consumer publications

May

	Current month 1987	Current month 1986	Year-to-date 1987	Year-to-date 1986
— Art & antiques —				
Art & Antiques (10X)	61.0	79.5	311.4	272.0
Art News	113.0	99.0	549.0	481.0
Southwest Art	80.1	62.0	524.9	427.4
Total Group	**254.1**	**240.5**	**1,385.3**	**1,180.4**
% change		**+5.7%**		**+17.4%**
— Auto/cycle/rec. vehicles —				
Autoweek (52X)	146.4	142.8	690.6	690.4
Car & Driver	121.5	100.9	459.4	462.5
Car Collector & Car Classics	22.3	16.8	88.9	73.5
Car Craft	114.1	86.2	413.2	355.8
Circle Track	96.1	66.9	375.1	311.6
Cycle	63.8	66.7	261.2	270.5
Cycle Guide (9X)	49.5	75.0	215.6	253.3
Cycle World	65.5	77.8	296.3	292.6
Dirt Rider	40.0	52.2	178.3	226.7
Dune Buggies & Hot VWs	77.7	89.0	370.0	434.4
Family Motor Coaching	155.6	147.5	780.2	759.1
4 Wheel & Off-Road	111.1	95.8	410.1	424.3
Four Wheeler	99.0	96.0	418.0	418.0
Hot Rod	105.9	73.9	377.6	308.9
Motorcyclist	68.1	65.6	255.1	269.9
Motor Trend	116.4	71.7	399.2	334.9
Motorhome	100.1	104.3	414.2	469.5
Rider	61.8	84.3	231.9	280.4
Road & Track	127.5	104.6	484.0	487.0
3 Wheeling	41.2	57.1	202.4	294.5
Trailblazer	47.0	40.0	249.0	195.0
Trailer Life	124.8	131.4	517.2	589.6
Total Group	**1,955.4**	**1,846.5**	**8,057.5**	**8,202.3**
% change		**+5.9%**		**−1.8%**
— Boating & yachting —				
Boating	140.3	149.1	845.7	795.1
Chesapeake Bay	47.0	40.5	217.3	182.3
Cruising World	113.3	129.7	594.7	646.8
Lakeland Boating (10X)	81.5	82.0	386.2	361.2
Motor Boating & Sailing	168.5	176.9	923.1	1,005.8
Sail	115.9	122.8	592.4	607.6
Small Boat Journal(6X)	—	—	122.9	113.1
Southern Boating	65.8	68.9	344.6	355.6
Trailer Boats(11X)	58.4	57.2	327.6	253.2
Western Boatman(6X)	40.1	38.1	122.5	132.8
Yachting	149.7	148.3	758.9	766.5
Total Group	**980.5**	**1,013.4**	**5,235.9**	**5,220.0**
% change		**−3.2%**		**+0.3%**
— Canadian —				
L'Actualite	98.8	107.8	407.1	433.6
Chatelaine				
English Edition A	88.8	104.1	384.6	487.5
French Edition	77.8	96.5	359.9	424.3
City & Country Home(10X)	61.3	72.0	229.8	200.6
Equinox	44.3	50.0	117.1	115.0
Flare A	119.2	123.9	412.6	382.6
Harrowsmith-Canada (6X)	53.0	45.0	255.0	182.0
Macleans (52X) A	106.4	139.4	571.9	672.7
Moneywise	42.2	41.8	164.3	192.4
Reader's Digest				
Canadian-English A	78.4	91.5	334.7	435.3
Canadian-French A	56.5	90.3	287.8	358.1
Toronto Life	103.7	102.6	451.1	439.1
Vancouver	82.3	85.2	313.2	364.1
Total Group	**1,012.6**	**1,150.1**	**4,289.1**	**4,687.3**
% change		**−12.0%**		**−8.5%**
— Civic/fraternal —				
American Legion	26.5	22.2	162.2	126.4
Elks (10X)	17.4	16.5	105.9	96.7
Kiwanis	18.3	17.2	90.0	91.9
Lion (10X)	8.5	3.6	42.5	25.4
Rotarian	16.1	22.8	76.7	78.7
V.F.W. (11X)	27.5	24.2	155.0	137.5
Total Group	**114.3**	**106.5**	**632.3**	**556.6**
% change		**+7.3%**		**+13.6%**
— Comics —				
DC Comics	6.0	5.0	33.0	30.0
Marvel Comics Group	10.0	8.0	44.0	35.0
Total Group	**16.0**	**13.0**	**77.0**	**65.0**
% change		**+23.1%**		**+18.5%**
— General —				
American Health (10X)	77.2	51.8	293.9	223.8
American West (6X)	44.8	34.0	117.3	126.8
The Atlantic A	27.5	34.0	185.7	206.3
Bon Appetit A	99.2	85.6	407.7	408.9
Changing Times	70.8	49.3	330.9	250.2
Connoisseur	94.2	113.8	359.7	353.8
Consumers Digest (6X)	21.5	17.0	75.3	75.0
Ebony	99.7	115.4	445.2	483.1
Fifty Plus	41.4	40.7	218.0	212.3
Food & Wine	62.4	61.7	266.4	230.4
Games (6X)	—	—	43.5	92.6
Golden Years	38.1	21.4	202.4	111.4
Harper's A	24.3	30.9	161.7	123.2
Harrowsmith (6X)	41.0	31.0	145.6	122.3
Let's Live	43.0	56.0	231.0	240.0
Life	42.3	88.0	232.9	282.4
Mature Outlook	53.6	53.7	154.6	134.5
Modern Maturity (6X)	—	—	100.0	85.6
Money	134.3	150.3	639.3	613.8
Money Maker	8.7	—	8.7	—
Moneyworth (4X)	—	—	25.0	20.5
Mother Jones (9X)	15.2	22.1	69.9	63.9
National Geographic	29.8	29.8	99.4	116.9
National Geographic Traveler(4X)	—	—	45.4	46.0
Natural History	28.4	43.9	180.6	220.9
Prevention	58.2	62.6	322.2	317.7
Psychology Today	33.0	29.2	161.5	144.2
Reader's Digest A	151.9	126.3	490.7	572.0
Saturday Evening Post (9X)	47.6	40.6	169.4	150.7
Signature	50.2	77.4	322.2	354.1
Smithsonian	97.5	84.4	405.0	407.2
Sylvia Porter's Personal Finance (10X)	51.7	34.8	219.7	176.7
Town & Country	124.3	152.8	575.8	606.9
Travel-Holiday	37.9	38.9	260.3	237.7
Travel & Leisure	115.6	112.7	491.0	539.7
Vanity Fair	64.9	44.4	272.8	214.7
Writer's Digest	28.7	29.9	135.6	122.0
Yankee	87.2	76.5	408.1	362.6
Total Group	**2,091.1**	**2,087.0**	**9,274.3**	**9,052.6**
% change		**+0.2%**		**+2.4%**
— Home —				
Americana (6X)	17.4	25.3	69.2	94.1
Architectural Digest A	154.8	162.2	592.3	598.6
Better Homes & Gardens	145.0	149.9	554.8	565.5
Colonial Homes (6X)	81.1	77.0	200.3	203.5
Columbus Monthly-Homes(4X)	—	—	126.4	119.1
Country Home (6X)	61.3	49.0	149.3	141.1
Country Living	105.4	66.9	435.9	363.3
Dallas/Ft. Worth Home & Garden	78.8	85.5	298.0	411.9
Family Handyman (10X) A	63.9	69.3	302.8	337.6
Flower & Garden (6X)	—	—	104.4	100.8
Home	80.5	48.6	269.6	241.5
Home Mechanics	57.4	66.0	291.0	347.0
The Homeowner (10X)	33.8	30.9	157.3	141.1
Horticulture	46.8	42.1	208.5	202.7
House Beautiful	91.5	91.2	351.9	386.9
House & Garden	108.6	133.1	454.6	487.9
Houston Home & Garden	82.2	64.8	354.0	385.3
Metropolis	79.2	33.0	256.5	133.8
Metropolitan Home	72.0	76.5	336.8	313.7
1,001 Home Ideas	57.7	48.8	265.8	221.7
Phoenix Home/Garden	69.7	57.8	374.7	351.3
Practical Homeowner	42.8	56.9	236.3	262.7
Rodale's Organic Gardening	43.3	55.5	299.8	344.4
San Diego Home/Garden	105.8	92.8	351.1	347.4
South Florida Home/Garden	31.8	25.3	183.4	152.9
Southern Accents (6X)	108.9	142.1	288.8	318.0
Southern Living	157.2	175.0	629.9	738.3
Sunset Magazine A	168.9	179.5	609.5	728.8
Texas Homes	30.2	56.4	374.0	572.4
Workbench (6X)	36.8	41.1	145.9	159.8
Total Group	**2,212.4**	**2,172.6**	**9,272.7**	**9,773.1**
% change		**+1.8%**		**−5.1%**
— In-flight & other passenger —				
Aboard Group (7)(6X)	24.0	24.2	76.1	67.0
Alaska Airlines	56.8	60.4	274.4	268.3
America West Airlines	41.3	27.2	212.7	77.2
American Way (24X)	105.9	100.3	475.5	466.6
Brighton Inflight Group				
Braniff	21.3	10.2	67.3	49.2
Continental	52.7	33.8	243.7	147.9
Hawaiian Air (6X)	17.8	—	30.9	—
East/West Network				
Eastern Review	69.8	96.0	384.6	492.8
Northwest	44.5	45.0	218.8	228.8
PSA Magazine	84.3	94.0	385.8	444.5
Pan Am Clipper	50.0	42.8	208.1	231.1
Spirit	54.2	91.8	290.7	461.1
TWA Ambassador	53.0	—	240.3	—
Vis `A Vis	57.2	87.5	293.0	455.1
Halsey Publications				
Air Cal	69.8	51.0	279.8	235.9
Delta Sky	84.3	77.2	390.0	379.3
US Air	57.0	47.2	228.5	217.7
Piedmont Airlines' Pace	104.2	72.0	432.5	401.8
Spirit of Aloha (6X)	28.6	25.4	157.4	143.1
Total Group	**1,076.6**	**985.9**	**4,860.0**	**4,767.2**
% change		**+9.2%**		**+1.9%**
— Men's —				
Esquire A	94.0	89.0	415.0	424.0
Firehouse Magazine	31.5	30.2	195.3	199.6
Gentlemen's Quarterly A	142.2	131.6	668.5	728.9
M Magazine	50.0	50.5	335.2	275.0
Penthouse A	41.2	34.9	243.5	216.4
Playboy A	82.2	69.9	269.3	313.3
Salute (8X)	24.7	21.7	77.4	43.1
Total Group	**465.8**	**427.7**	**2,204.1**	**2,200.3**
% change		**+8.9%**		**+0.2%**
— Metropolitan —				
Aloha (6X)	27.5	32.2	86.9	85.7
Atlanta	70.7	69.7	285.2	264.1
Baltimore	74.9	80.6	355.6	370.5
Boston	180.6	178.0	741.1	729.8
California	68.5	95.1	291.1	319.3
Chicago	114.3	141.9	513.2	599.4
Chicago's North Shore	95.5	90.7	401.9	374.9
Cincinnati	65.5	270.7	67.6	305.2
Cleveland	81.3	88.2	362.1	355.1
Coast (52X)	383.3	248.4	1,094.7	790.6
Columbus Monthly	69.8	79.7	313.6	322.5
Connecticut	101.2	96.3	493.7	458.5
D/Magazine, Dallas/Ft Worth	112.4	149.8	542.4	635.2
Denver	40.7	42.0	161.5	174.6
Detroit Monthly	66.8	66.7	351.3	405.2
Grand Rapids	33.0	35.0	178.7	179.8
Gulfshore Life (10X)	55.0	47.0	481.8	425.0
Honolulu	73.1	66.7	288.2	290.7
Houston City	36.7	59.0	196.8	269.5
Louisiana Life (6X)	41.0	39.8	105.6	119.0
Madison	66.5	64.0	316.6	313.0
Memphis	82.0	78.0	387.0	358.0
Metropolitan Detroit	90.0	105.5	311.5	368.8
Miami Mensual	37.1	50.9	208.6	234.4
Miami/South Florida	50.2	88.1	275.4	383.7
Mid Atlantic Country	43.7	45.8	192.3	193.4
Milwaukee	61.7	75.8	269.8	337.4
Minneapolis/St. Paul	103.5	100.5	497.5	471.5
Nashville	26.0	28.0	189.0	185.0
New England Monthly	60.4	54.5	211.3	186.4
New Jersey Monthly	84.6	80.8	422.0	384.5
New Mexico	24.8	20.3	110.4	92.3
Ohio	66.8	78.1	279.0	284.6
Oregon (6X)	46.0	—	90.0	—
Orlando	81.9	90.7	465.0	504.2
Palm Beach Life	32.7	32.5	418.9	397.1
Palm Springs Life	90.8	89.6	625.7	610.9
Philadelphia	142.4	141.7	685.1	624.8
Phoenix	61.9	81.3	359.2	489.3
Pittsburgh	61.2	67.0	310.4	295.3
St. Louis	65.8	42.8	264.0	213.8
San Diego	157.8	128.0	675.1	693.2
San Francisco Focus	136.0	102.1	475.4	441.6
Texas Monthly	117.9	130.6	467.5	653.0
Twin Cities	68.4	50.4	293.3	237.0
The Virginian (6X)	60.0	58.0	174.6	175.0
Washington (7X)	74.0	90.0	170.0	229.1
The Washingtonian	163.0	193.3	757.2	749.0
Total Group	**3,948.6**	**4,145.8**	**17,214.6**	**17,580.9**
% change		**−4.8%**		**−2.1%**
— Movie/romance/radio/tv —				
Macfadden's Women's Group				
Modern Romances	25.0	22.7	119.1	102.4
Secrets	25.0	22.7	119.1	102.4
True Confessions	25.0	22.7	119.1	102.4
True Experience	25.0	22.7	119.1	102.4
True Love	25.0	22.7	119.1	102.4
True Romance	25.0	22.7	119.1	102.4
Sterling Women's Group				
Daytime TV	25.5	25.8	123.6	125.0
Modern Screen (6X)	—	—	29.0	31.0
Movie Mirror (6X)	—	—	14.5	16.5
Soap Opera Stars (6X)	—	—	30.7	33.3
TV Movie Screen (6X)	—	—	14.6	16.6
TV Picture Life (6X)	—	—	3.0	9.6
Total Group	**175.6**	**162.0**	**929.9**	**846.3**
% change		**+8.4%**		**+9.9%**
— Music/entertainment —				
Audio	91.3	78.1	379.3	345.8
Dance Magazine	67.3	69.6	186.3	193.9
Playbill	59.7	52.0	223.9	222.1
Spin	25.7	22.5	131.6	140.1
Stereo Review	73.8	73.6	399.5	340.0
Video Magazine	66.5	75.1	354.7	366.1
Total Group	**384.3**	**370.9**	**1,675.4**	**1,608.0**
% change		**+3.6%**		**+4.2%**
— Outdoor & sport —				
Alaska	49.6	36.4	192.5	228.1
The American Handgunner(6X)	43.0	35.0	121.0	100.0
American Hunter	12.4	15.2	89.1	85.2
American Rifleman	17.3	19.2	121.3	105.1
Backpacker (6X)	38.6	41.1	92.4	86.0
Bass Master (10X) A	43.0	49.8	372.6	353.8
Bicycling (9X)	121.3	100.2	419.6	367.2
Ducks Unlimited (6X)	32.5	21.7	71.6	79.7
Field & Stream	89.3	115.1	445.4	475.6
Fins & Feathers A	35.4	34.4	210.9	218.5
Fishing World	36.3	53.8	148.0	166.5
Florida Sportsman	127.2	111.0	715.7	657.6
Flying	40.8	29.8	220.8	176.7
Golf Digest	140.6	104.8	549.0	512.3
Golf Magazine	53.5	449.9	50.5	435.8
Gun Dog (6X)	27.9	30.8	91.7	88.2
Guns	24.0	32.0	121.0	143.0
Guns & Ammo	46.5	48.7	218.1	238.7
In-Fisherman (6X)	117.0	107.0	262.0	210.0
Muscle & Fitness	131.5	104.6	595.0	538.3
Outdoor Life	96.1	91.7	430.5	428.4
Outside Magazine	66.3	47.4	258.8	238.3
Petersen's Hunting	42.1	43.7	215.7	205.8
Runner's World (13X)	61.9	34.2	199.7	160.5
Southern Outdoors Saltwater Magazine (8X)	44.8	—	141.4	—
Salt Water Sportsman	102.8	98.6	617.8	585.3
Sierra (6X)	34.3	38.4	119.3	126.4
Shooting Times	32.2	32.5	202.0	220.7
Ski (8X) A	—	—	252.2	249.2
Skin Diver	108.6	104.5	503.0	461.8

A. Sectional linage included but prorated to circulation of regional editions.

All figures represented in this chart are supplied by the magazines. Advertising Age makes no attempt to verify them and, therefore, is not responsible for inconsistencies or errors.

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(Continued from Page 83)

May

	Current month 1987	Current month 1986	Year to date 1987	Year to date 1986
Southern Outdoors (9X)	47.2	42.8	255.7	224.4
Sport	37.8	37.7	190.7	207.3
Sports Afield	96.3	87.7	508.1	388.8
Tennis	97.7	94.1	340.9	350.5
Waterski (8X)	77.3	59.6	203.3	154.4
Western Outdoors (10X)	48.1	46.4	251.0	272.7
Wildfowl (6X)	—	—	17.3	18.3
Wing & Shot	11.5	—	33.5	—
World Tennis	38.0	33.5	132.8	146.7
Total Group	**2,270.8**	**2,433.1**	**9,982.1**	**9,705.7**
% change		**-6.7%**		**+2.8%**
— Photography —				
American Photographer	52.2	36.2	170.0	181.3
Petersen's Photographic	33.0	28.1	134.6	119.7
Popular Photography	72.0	57.8	339.2	312.2
Total Group	**157.2**	**122.1**	**643.8**	**613.2**
% change		**+28.8%**		**+5.0%**
— Religious —				
Charisma	46.2	55.5	242.8	273.2
Christian Herald (11X)	28.8	25.2	142.0	146.9
Christian Life	21.7	19.2	122.0	129.4
Christianity Today (18X)	25.2	28.8	255.7	249.2
Ministries Today (6X)	—	—	77.1	136.7
Our Sunday Visitor (52X)	17.4	11.5	72.2	56.1
Today's Christian Woman (6X)	49.8	41.2	115.5	96.0
Total Group	**189.1**	**181.4**	**1,027.3**	**1,087.4**
% change		**+4.2%**		**-5.5%**
— Science/electronic/mechanic —				
Discover	44.3	28.9	227.3	158.2
Family Computing	32.4	42.8	227.8	211.6
Omni	62.6	56.3	349.9	337.3
Personal Computing	178.5	127.0	687.8	554.7
Popular Mechanics	116.9	119.9	470.8	481.9
Popular Science	102.0	370.3	70.9	374.5
Scientific American	73.5	34.7	205.6	165.7
Spectrum	66.5	86.7	335.6	459.6
Total Group	**676.6**	**866.6**	**2,575.7**	**2,743.5**
% change		**-21.9%**		**-6.1%**
— Woman/fashion/service —				
Bride's Magazine (6X) A	—	—	906.5	794.4
Essence	100.1	95.7	381.3	421.2
Family Circle (17X) A	104.3	196.0	564.8	748.9
Glamour	206.1	209.7	947.2	893.8
Good Housekeeping A	194.7	200.5	703.8	805.3
Harper's Bazaar	117.5	114.5	662.7	671.7
Health	51.6	55.4	231.4	209.9
Ladies' Home Journal	110.6	117.2	503.8	564.4
Mademoiselle	175.1	164.5	753.9	627.5
McCall's	107.6	117.9	469.0	465.8
Military Lifestyle	38.5	45.1	225.3	200.3
Modern Bride (6X)	—	—	817.6	706.3
Ms.	33.5	55.8	178.5	204.3
New Woman	101.2	79.2	409.6	355.4
Parents Magazine A	130.8	98.3	520.5	442.7
Redbook	127.1	105.5	490.2	466.2
Self	117.6	118.2	503.9	475.7
Seventeen	110.9	110.6	596.8	528.0
Shape	76.0	77.1	356.9	352.3
Soap Opera Digest (26X)	18.2	15.1	92.5	94.3
Teen Magazine	70.9	75.3	263.1	238.2
True Story A	47.7	40.2	238.4	232.9
Vogue	227.9	218.0	1,296.0	1,251.4
W Magazine	69.1	78.2	576.6	541.5
Woman (9X)	—	—	99.0	51.0
Weight Watchers	29.2	28.5	159.9	169.2
Woman's Day (16X) A	91.1	168.2	585.3	645.4
Women's Sports & Fitness	32.0	22.5	123.8	105.8
Workbasket	23.7	26.5	160.4	179.0
Working Mother	87.0	80.9	389.9	342.6
Working Woman	131.0	119.6	490.9	514.6
Total Group	**2,730.9**	**2,824.3**	**14,699.3**	**14,300.0**
% change		**-3.3%**		**+2.8%**
— Youth —				
Boys' Life	16.6	15.6	77.2	78.7
Campus Life (10X)	27.3	22.3	193.2	207.5
Total Group	**43.9**	**37.9**	**270.4**	**286.2**
% change		**+16.0%**		**-5.5%**

April

	Current month 1986	Current month 1985	Year to date 1986	Year to date 1985
— Business/national —				
Barron's	218.8	202.2	810.4	753.0
Black Enterprise	35.0	38.8	214.4	244.2
Business Week (52X) A	439.1	385.4	1,286.5	1,202.8
Financial World (26X)	79.6	66.4	260.8	205.1
Forbes (26X)	381.1	369.6	971.2	1,001.2
Fortune (26X)	376.7	286.2	872.1	820.5
Frequent Flyer	61.8	64.4	207.2	233.0
Futures	43.5	51.5	184.3	186.0
High Technology	20.4	18.0	70.7	72.5
Inc. Magazine A	75.2	91.0	289.2	305.0
Income Opportunities	73.7	58.8	259.4	204.4
Industry Week (25X) A	72.2	90.9	269.9	321.0
Nation's Business (12X) A	23.6	36.1	101.7	132.6
Savvy	38.5	40.8	141.8	125.9
Venture	51.5	68.7	248.1	249.3
Total Group	**1,990.6**	**1,868.6**	**6,187.7**	**6,056.5**
% change		**+6.5%**		**+2.2%**
— Business/regional —				
Advantage-Nashville	58.0	58.0	218.0	222.0
Arizona Bus. Gazette (52X)	33.9	31.8	125.9	131.5
Austin Bus. Journal (52X)	37.2	46.6	141.7	—
Baltimore Bus. Journal	81.1	74.9	343.3	260.0
Boston Bus. Journal (52X)	127.3	135.7	474.1	545.0
Business Atlanta	66.3	67.6	218.2	226.2
Business First of Buffalo	43.5	56.9	238.8	235.7
Business First of Columbus	86.7	75.5	377.2	307.5
Business Journal-Milwaukee	113.8	85.1	451.3	407.6
Business Journal-Sacramento	62.0	38.7	218.8	155.7
Business North Carolina	38.8	45.0	147.3	147.5
Capital Dist. Bus. Review (52X)	63.1	—	295.0	—
Cincinnati Business Courier	112.4	61.5	418.5	285.5
Corporate Report Kansas City	22.8	25.1	83.5	127.4
Corporate Report Minnesota	68.0	82.0	280.0	304.0
Crain's Chicago Bus. (52X)	147.0	175.0	562.0	613.0
Crain's Cleveland Bus. (52X)	66.7	68.9	208.5	232.7
Crain's Detroit Bus. (52X)	80.4	63.4	285.5	232.7
Crain's New York Bus. (52X)	43.8	37.3	126.5	128.7
Florida Trend (13X)	194.3	197.5	466.4	461.3
Georgia Trend	103.0	76.5	306.5	215.9
Grand Rapids Bus. Journal	47.6	34.6	172.9	118.2
Hawaii Business	41.0	51.2	160.0	167.7
Houston Bus. Journal (52X)	82.6	97.0	211.8	322.7
Indianapolis Bus. Journal (52X)	136.1	156.8	516.5	555.3
Intercorp-Connecticut (26X)	216.0	124.0	424.9	340.0
Manhattan Inc.	81.2	76.7	283.9	257.5
New England Bus. (20X) A	80.6	88.9	237.9	311.0
Pacific Bus. News (52X)	111.2	110.0	426.5	430.0
Philadelphia Bus. Journal (52X)	139.5	129.2	528.7	442.0
Pittsburgh Bus. Times (52X)	110.5	98.2	467.0	382.0
Providence Business News	80.2	—	260.4	—
Regarde s/Washington	165.5	134.0	549.7	472.6
San Jose Bus. Journal	63.0	86.5	247.6	365.1
South Florida Bus. Journal	83.7	98.0	424.5	429.1
St. Louis Bus. Journal (52X)	134.2	130.9	485.0	521.1
Texas Business	31.6	75.6	129.0	221.9
Warfields Monthly Baltimore	71.3	40.5	248.8	89.3
Total Group	**3,325.7**	**3,034.8**	**11,762.1**	**10,854.6**
% change		**+9.6%**		**+8.4%**
— National Sunday magazines —				
Parade (52X)	48.8	60.3	203.1	222.8
USA Weekend (52X)	45.9	57.3	167.5	220.6
Total Group	**94.7**	**117.6**	**370.6**	**443.4**
% change		**-19.5%**		**-16.4%**
— Newspaper Sunday magazines —				
Boston Globe	206.3	217.3	751.2	768.3
Chicago Tribune	135.5	101.5	431.1	371.5
Cleveland Plain Dealer	81.7	72.5	216.5	186.9
Columbus Dispatch	56.1	62.2	162.6	165.8
Detroit News	74.0	86.0	281.0	308.0
L.A. Times	125.9	132.3	369.2	328.5
Miami Herald	39.4	43.0	162.9	177.2
New York Times Magazine	344.7	310.5	1,300.3	1,242.5
Philadelphia Inquirer	97.0	74.0	268.0	270.0
Seattle Times	74.0	65.0	214.0	198.0
St. Louis Post Dispatch	148.0	144.0	350.0	291.0
Toledo Blade Magazine	41.8	46.0	138.3	159.4
Washington Post	154.9	120.6	535.5	515.1
Total Group	**1,579.3**	**1,475.0**	**5,180.5**	**4,982.2**
% change		**+7.1%**		**+4.0%**
— Weeklies/bi-weeklies —				
The Advocate (26X)	120.4	176.1	487.5	539.3
Army Times Military Group				
Air Force Times (52X)	172.1	176.0	636.5	680.7
Army Times (52X)	167.7	169.2	617.3	640.0
Navy Times (52X)	189.7	186.6	698.2	729.7
The Blood-Horse (52X)	232.3	286.8	1,698.0	1,625.3
Capper's (26X)	21.0	40.6	137.8	126.9
Commonweal (22X)	9.5	4.5	36.5	33.7
Golf World (43X)	143.5	117.0	397.5	363.5
Grit (52X) A	22.3	27.0	124.4	101.3
National Journal (50X)	107.5	87.6	253.7	237.3
National Review (25X)	33.9	35.1	124.4	121.5
New Republic (48X)	43.6	36.1	141.5	133.3
New York Magazine (50X)	265.8	266.9	897.1	897.7
New Yorker	180.3	228.1	734.2	776.6
Newsweek (52X) A	222.3	209.6	786.7	770.1
People (52X)	299.5	297.9	1,033.9	1,055.8
Rolling Stone (25X)	156.4	107.2	468.7	387.6
Sporting News (52X)	62.4	63.3	202.8	227.1
Sports Illustrated (52X) A	244.5	250.0	842.7	882.7
Time (52X) A	205.6	223.1	770.4	801.9
Travelhost (52X) C	3,219.0	3,146.0	11,739.0	11,580.0
TV Guide (52X) A	265.2	231.1	1,259.9	1,250.4
TV Update (52X) C	2,150.0	2,093.0	9,204.0	8,913.0
Us Magazine (26X)	78.8	30.8	178.7	134.5
U.S. News & World Report (52X) A	114.4	130.0	471.9	489.2
Total Group	**8,727.6**	**8,619.8**	**33,943.2**	**33,497.0**
% change		**+1.3%**		**+1.3%**
— Foreign —				
Business Week Int'l (52X)	134.3	163.5	383.6	451.1
De Armas Publications				
Geomundo				
Central America	7.0	6.0	18.0	13.0
Chile	5.0	6.0	15.0	13.0
Colombia	14.0	11.0	41.0	27.3
Ecuador	7.0	4.0	18.0	10.0
Mexico	9.0	4.0	25.5	16.5
Peru	6.0	5.0	14.0	10.0
Puerto Rico	6.0	3.0	20.0	6.0
U.S.	4.7	3.0	12.7	14.0
Venezuela	13.0	10.0	47.0	36.0
Hombre De Mundo				
Central America	5.0	2.0	18.0	19.0
Chile	5.0	2.0	19.0	16.0
Colombia	10.0	9.2	29.3	38.0
Ecuador	6.0	3.0	19.0	15.0
Mexico	9.0	7.0	29.0	22.0
Peru	4.0	2.0	12.0	11.0
Puerto Rico	4.0	3.0	17.0	13.0
U.S.	11.5	6.0	49.8	38.5
Venezuela	12.0	15.0	47.0	50.0
Ideas Para Su Hogar				
Colombia	6.5	4.0	25.3	24.7
Ecuador	3.0	2.0	4.0	6.0
Mexico	8.8	6.0	20.5	9.0
Peru	3.5	1.0	15.0	4.0
Puerto Rico	—	—	—	—
U.S.	4.0	3.0	17.0	12.0
Venezuela	5.0	7.8	14.0	28.3
Mecanica Popular				
Argentina	4.3	3.7	25.3	10.7
Central America	7.7	10.0	31.7	35.3
Chile	2.7	6.0	13.7	20.3
Colombia	13.2	16.5	56.7	57.7
Mexico	11.2	10.0	45.0	33.7
Peru	8.2	16.5	56.7	57.7
Puerto Rico	6.2	6.5	24.7	26.8
U.S.	5.7	4.0	18.7	22.5
Venezuela	10.2	10.5	35.2	36.8
Vanidades Continental				
Central America	30.0	21.7	51.7	43.2
Chile	5.7	7.3	10.8	14.3
Colombia	89.2	106.0	188.5	191.2
Ecuador	24.0	29.5	61.8	65.5
Mexico	105.0	113.0	259.5	211.2
Peru	25.3	18.0	60.0	33.3
Puerto Rico	75.3	57.2	152.3	114.8
U.S.	56.8	48.8	199.3	150.8
Venezuela	59.0	42.8	138.7	118.0
Hearst International Publications				
Buenhogar				
Chile	1.0	1.0	4.0	4.0
Colombia	16.0	30.0	58.5	84.3
Ecuador	7.0	8.0	27.0	33.0
Mexico	33.7	40.3	96.3	88.3
Peru	8.0	4.0	26.5	13.0
Puerto Rico	3.5	9.5	7.3	31.5
U.S.	15.0	14.7	78.5	70.8
Venezuela	18.5	13.7	56.7	62.7
Cosmopolitan en Espanol				
Central America	4.0	1.0	14.0	7.7
Colombia	9.0	4.0	29.0	21.0
Mexico	39.5	40.0	93.5	85.8
Puerto Rico	10.0	13.0	44.8	27.7
U.S. (Spanish language)	21.5	17.7	90.7	79.8
Venezuela	20.0	7.0	49.0	38.7
Cosmopolitan Foreign				
Australia	67.7	69.1	231.8	224.5
Brazil	81.4	55.7	253.8	236.6
China	50.0	48.5	192.5	144.4
France	139.5	140.2	348.8	254.7
Germany	153.2	152.8	406.9	370.5
Great Britain	114.0	134.0	313.0	348.5
Greece	53.0	41.0	144.0	135.0
Holland	91.0	80.0	214.0	201.0
Italy	109.3	103.3	296.8	265.8
Japan	56.9	51.3	165.8	263.3
South Africa	74.0	58.0	267.0	258.0
Good Housekeeping Foreign				
Australia	28.2	22.0	91.8	100.7
Great Britain	161.0	149.8	454.3	440.4
International Management				
English	33.7	53.8	99.8	162.2
Middle East	5.7	11.2	20.7	35.8
Johnston International				
Alam Attijarat	27.2	35.2	96.0	130.8
Far East Business	21.2	46.0	77.5	117.0
Modern Africa (6X)	8.0	15.8	18.2	29.1
Newsweek International A				
Atlantic (52X)	82.5	85.1	252.7	279.3
Latin America (52X)	25.0	30.0	93.0	104.9
Pacific (52X)	49.9	49.7	186.0	197.4
Reader's Digest				
Asian	163.0	131.5	638.0	829.0
Australian	73.5	76.8	215.0	232.4
Belgian-Flemish	53.5	85.3	154.5	239.3
Belgian-French	37.0	44.3	94.5	152.8
British	51.0	32.5	170.1	162.5
Chinese B	73.8	83.0	307.6	374.0
Danish	28.0	26.0	120.0	110.8
Dutch	56.8	48.0	154.8	121.1
Finnish	100	68.5	169.5	178.3
French	36.2	15.1	84.0	56.7
German	92.0	83.3	297.0	262.8
Indian-English	78.0	98.0	270.0	267.0
Indian-Hindi	11.5	10.5	47.0	34.5
Italian	57.5	44.0	159.0	97.5
Korean	43.0	29.3	121.8	77.9
Latin American				
Argentina	10.5	15.0	46.0	40.5
Brazil	—	—	—	14.0
Central American	4.0	10.0	17.0	23.0
Chile	4.0	11.0	40.0	39.5
Colombia	—	3.0	74.0	42.0
Ecuador	3.0	9.0	12.0	23.0
Mexico	55.4	61.7	188.8	161.5
Peru	3.0	9.0	15.0	28.0
Puerto Rico	4.0	6.5	15.0	19.5
U.P.B.	4.5	7.0	16.5	21.0
U.S. Spanish	8.5	64.0	25.0	80.0
Venezuela	4.5	6.5	18.5	22.5
New Zealand	39.0	31.0	174.5	203.5
Norwegian	24.5	8.5	51.3	25.5
Portugal	57.5	36.5	142.5	144.0
South African	60.0	59.5	245.5	251.0
Swedish	6.0	13.0	25.0	55.0
Swiss-French	15.0	22.0	88.5	86.0
Swiss-German	20.3	28.0	114.0	115.0
Time International				
Time-Asia	39.3	90.3	165.4	255.9
Time-Atlantic	78.6	121.5	287.9	347.9
Time-Canada	147.7	217.0	588.6	702.6
Time-Latin America	29.0	42.2	96.8	164.4
Visao (52X)	107.5	163.3	395.2	554.8
Vision/Latin America (24X) A	26.4	24.0	72.4	79.7
Total Group	**4,192.8**	**4,395.9**	**13,245.4**	**13,868.4**
% change		**-4.6%**		**-4.5%**

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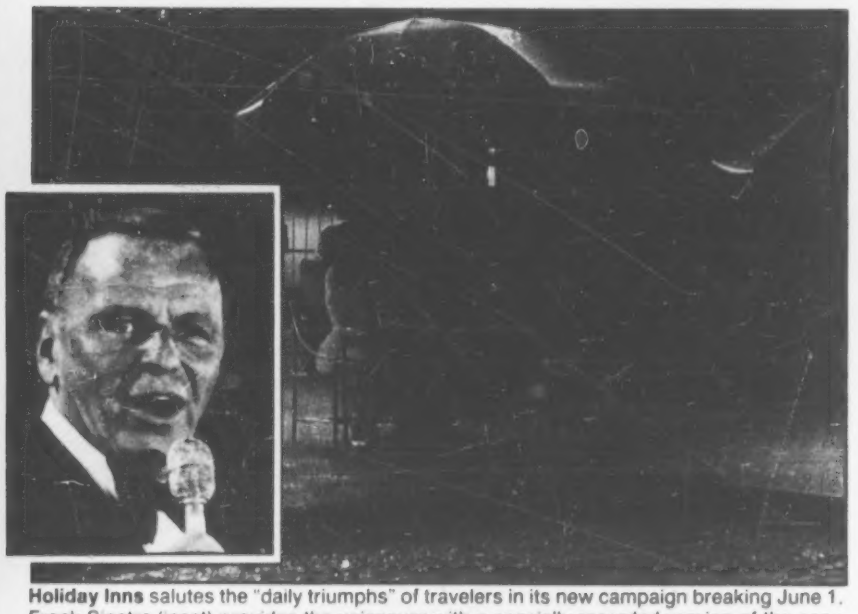

Holiday Inns salutes the "daily triumphs" of travelers in its new campaign breaking June 1. Frank Sinatra (inset) provides the voiceover with a specially recorded version of the song "Here's to the Winners."

Holiday Inns books Sinatra

By GARY LEVIN

Caught in a squeeze between upscale and budget hotel chains, Holiday Inns is turning to Frank Sinatra for help.

The Memphis-based "innkeeper" that took its name from a Bing Crosby movie will try to position itself as a "winner" in an estimated $15 million TV and print ad campaign breaking June 1.

It will be Holiday Inns' first image effort since early 1986.

Ol' Blue Eyes won't appear in the ads, but has re-recorded his classic "Here's to the Winners" for TV spots featuring emotional, vignette-style scenes captured by cinematographer Gordon Willis.

Bozell, Jacobs, Kenyon & Eckhardt, New York, handles the effort, themed "You're a winner, we're on your way."

The campaign is part of a newly aggressive marketing stance from the "world's largest innkeeper," which last year hired Andrew Lien as its senior VP-worldwide marketing, from Kentucky Fried Chicken Corp.

David McConnaughey, VP-management supervisor, BJK&E, said the campaign "celebrates our users and the positiveness of their travel experience." It escapes what he calls the Oedipus complex of smiling hotel employees and service claims, and instead seeks a unique brand personality.

Research findings led Holiday Inns to develop a campaign based on "personal achievement," using scenes to dramatize

(Continued on Page 66)

Last Minute News

Trintex lines up 42 advertisers

White Plains, N.Y.—Trintex, the $450 million videotex joint venture between IBM and Sears, has signed 42 advertisers. They include: Aetna, Buick, Carnation, Dean Witter Reynolds, Field Publications, Florsheim, Ford, Nestle, NEC Home Electronics, Showtime/The Movie Channel and Volkswagen of America/Audi of America. Also, the service has contracted with Dow Jones & Co., *USA Today* and "Consumer Reports," as well as a dozen syndicated columnists, to supply editorial information. After Trintex kicks off next year, it will start a campaign, via J. Walter Thompson USA, New York, to promote the service to potential subscribers.

Compton-DFS merger talks progress

New York—Merger talks between Saatchi & Saatchi Compton and DFS Dorland Worldwide (AA, April 13, *et seq*.) are progressing well with the possibility that internal details could be worked out this week, sources say. They add there were "no real stumbling blocks" left internally, though the plan still would have to face client approval.

P&G, Kodak join forces

Cincinnati—Procter & Gamble on Aug. 2 starts an estimated $15 million network TV and newspaper campaign for a back-to-school cross-promotion with Eastman Kodak. Six P&G personal-care brands will be tied to a giveaway of 60,000 VR35 Kodak cameras. Leo Burnett USA, Chicago,

(Continued on Page 8)

Global group attacks ad tax

Florida shakes world

By LAUREL WENTZ

Killarney, Ireland—The World Federation of Advertisers denounced Florida's 5% sales tax on advertising last week, and will petition the state to repeal the tax.

Worldwide advertisers are concerned that Florida's move might trigger similar taxes by cash-strapped governments outside the U.S.

"Whatever happens in one country is susceptible to happening in others" said Paul de Win, the WFA's Brussels-based director general. "It's a domino theory. There is a danger that every government that needs money could contemplate it."

The WFA is the worldwide counterpart of the U.S.' Association of National Advertisers. Members include major marketers such as Procter & Gamble Co. and Bristol-Myers Co.

"We got skunked in Florida," said Robert Goldstein, P&G's VP-advertising. Mr. Goldstein is an outspoken critic of the Florida tax and part of the U.S. delegation to the WFA meeting.

"The real story is that national advertisers feel we need to be organized in a more effective manner to provide support for the state organizations that are already there," he said.

Kraft, Frigidaire pull out of Florida, see story Page 68.

The greatest concern is in Canada, which often "borrows" regulatory ideas from the U.S.

John Foss, president of the Association of Canadian Advertisers, said the province of Quebec has a 2% tax on broadcasting and Newfoundland a 4% tax on all media advertising. Such taxes might spread in Canada if other U.S. states follow Florida's example, he warned.

In the WFA petition requesting the repeal of the Florida tax, the group said consumers' freedom of choice is aided by truthful adver-

(Continued on Page 68)

Suncare marketers raise their screens

By PAT SLOAN

The deep, dark tan—still associated with an image of health and wealth despite an awareness that the sun can damage skin—may lose some of its glamor this summer.

Fewer suncare marketers are glorifying tanning, while more are introducing bold talk about skin cancer in advertising as they market high-powered sunblocks to consumers.

One company, Eclipse Laboratories of Greenwich, Conn., has gone so far as to introduce a product with the word "cancer" in its name (AA, March 16).

Called Skin Cancer Garde, the ultra-protection sunblock is shown in print ads created by I. Goldberg & Partners, New York, that are dramatically themed: "The Sun. A matter of life and death."

The spread carries an oversize Surgeon General-type warning from the Skin Cancer Foundation, stressing that repeated overexposure of unprotected skin to the sun can cause premature aging and skin cancer, including malignant melanoma.

The suncare industry, with $400 million in retail sales last year, has taken note of Eclipse's dire message and its uniquely named product. But the com-

(Continued on Page 66)

Eclipse Laboratories and agency I. Goldberg & Partners, New York, are trying to deglamorize suntans with dramatic ads that paint a dark picture of the sun to sell protective products.

Turbulence

Controls asked for airline ads

By STEVEN W. COLFORD

WASHINGTON—The Transportation Department, under sharp attack in Congress for not moving more aggressively against airline marketing and performance problems, last week warned Continental Airlines—and all other major carriers—they face fines and other enforcement actions.

The Houston-based Texas Air Corp. carrier has been the subject of more complaints to the Transportation Department than any other airline this year.

In an appearance before a hostile House subcommittee, Continental VP-Marketing Services Jim O'Donnell said his company would not object to new federal controls, provided they took the form of industrywide rules that applied equally to all airlines.

Any likely rule would include requirements that airlines disclose on-time performance records and other service-related data. Consumer complaints also have focused on the availability of discount fares and sudden changes in frequent-flier programs.

Continental's Mr. O'Donnell warned against requiring lengthy disclosures in advertising, however. "Continental has seven fare compartments in its computer, ranging from regular fares to our advance purchase MaxSaver," he said. "The advertisement—just to provide a consumer with fare availability to and from New York City [covering all . . . destinations]—would take 50 pages."

Transportation Department critics, meanwhile, pressed legislation to shift responsibility for airline advertising and marketing to the Federal Trade Commission. Legislation to do so has been introduced in both the Senate and House.

However, one senior Democrat on the House energy and commerce committee, Rep. James Florio (D., N.J.), complained FTC "hasn't got any interest in what it's supposed to deal with under its existing authority, much less in taking on jurisdiction over the airlines."

Rep. Florio suggested policing of airline advertising be turned over to state attorneys general, some of whom have been increasingly active in challenging national advertisers.

Some congressional sources also contend the uproar over airline advertising may jeopardize ad-industry legislative objectives.

Among these is the passage of legislation amending the Federal Trade Commission Act to end the commission's authority to write industrywide rules against "unfair" ads.#

'Time,' others pare back int'l sales units

By JULIE SKUR HILL

Fortune, *Newsweek* and *Time* are backpedaling on the international front.

The magazines are restructuring international sales departments to cope with the declining value of the U.S. dollar. As the dollar falls, production costs overseas rise.

Newsweek International closed its two-person Chicago international sales office.

In New York, staff members have left the newsweekly or have been reassigned to the domestic sales staff.

A source close to the magazine said five members of New York's international staff were affected.

In 1985, Newsweek International started a Japanese-language edition of *Newsweek* and paid a royalty to American Express Co. to gain publishing rights for *Travel & Leisure Asia*.

"It's been a hell of a financial drain on them," the source added.

However, a Newsweek International spokeswoman said, "The two new magazines are very successful. Having more magazines to work on is only helping *Newsweek*."

Time Inc., which has been reducing its work force, has cut into the international sales departments of *Time* and *Fortune*.

At *Time*, two leaders of the international sales department are "pending reassignment," a spokesman said. Also, staff responsibilities have been shuffled.

William Kupper Jr., previously associate ad sales director at Time Inc.'s *Sports Illustrated*, is replacing Edward McCarrick as international ad sales director at *Time*.

Jack Crowley, associate publisher and international publishing director, also will be reassigned. His duties will be consolidated into other positions.

Previously, the international staff strictly sold space for international editions and domestic staff members only sold for the U.S. editions. Now, all salespeople will sell for all editions.

"This will maximize the presences of U.S. companies overseas," the *Time* spokesman said.

R. Timothy Leedy, *Fortune's* international publishing director, has left to pursue other opportunities, and his post will not be filled.

"*Fortune* was not having that much difficulty, compared to the newsweeklies," he said.

In fact, last week it announced a joint project with Hachette Filipacchi, Paris, to introduce a French edition of *Fortune* in 1988.

"Newsweeklies compete with the indigenous magazines, but people around the world still want to know the U.S. perspective on business," Mr. Leedy said.

May figures show combined year-to-date linage for Time's international editions down 22.6%, while combined Newsweek International figures fell 8.6% (AA, May 18). *Fortune* figures are not available.#

Highlights

What's cooking at Wendy's? 6

Wendy's International is expected to end a brief flirtation with its past this week when its new marketing team decides the beleaguered restaurant chain's future. The likely decision will be to initiate a formal review of its $50 million national ad account.

Murdoch goes to the movies 12

Murdoch Magazines and France's Hachette Publications again are teaming to translate a French magazine concept for an American audience. *Premiere* is the latest in a string of major magazines out to attract American moviegoers.

Southland calls out the troops 26

Southland Corp. is supplementing its new national ad campaign with an aggressive, price-oriented local campaign from W.B. Doner & Co., marking the first time Southland's 7-Eleven chain has brought in a second agency. Its job labeled "tactical," and for specific markets only, Doner is being referred to internally as the company's "S.W.A.T." team.

INTERNATIONAL

Havas' privatization will not affect accounts 48

Even though the French government is selling its 40.3% share of the Havas communications giant, the president of Havas' Eurocom division says the sale will have no effect on clients, accounts or international partnerships.

Mexican Televisa to modify ad tactics 49

Latin America's largest TV and entertainment conglomerate will modify its controversial "French plan"—which allows companies to pay for a year's advertising in advance—within three years, according to President Miguel Aleman.

OTHER NEWS

MasterCard International's new affinity marketing program is its latest effort to grab a bigger share of the travel and entertainment market dominated by American Express. Page 26.

Hiram Walker's shakeup of its U.S. agency roster is part of a long-term strategy to expand beyond its traditional distilled spirits base. Page 26.

At the American Graduate School of International Management, student teams develop an international advertising campaign for clients for a mere $2,000. Page 34.

Overall wine consumption increased in 1986, thanks to wine coolers, without which domestic wine sales may have declined. Page 50.

Procter & Gamble Co.'s olestra fat substitute may put the company among top U.S. food marketers. FDA clearance of olestra as a food additive could come within two years. P&G plans to use the substance in its food products and to sell it to food marketers, including fast-food chains. Page 61.

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Bay's agency list shrinks

Evans splices Frisco shops

By ALICE Z. CUNEO

SAN FRANCISCO—The agency scene continues to shrink here, with Salt Lake City-based Evans Communications acquiring Busse & Cummins and merging it into Evans/Lynch Rockey.

The merged agency, which will have about $20 million in billings, will continue under the Evans/-Lynch Rockey name. Busse & Cummins' billings were about $7 million.

The move forced E/LR to resign the $1 million Chilean Winter Fruit account because of a conflict with the $5 million California Tree Fruit Agreement business at Busse & Cummins.

Evans says the acquisition brings its total billings to more than $160 million. Evans hopes the San Francisco merger will give it an opportunity to focus on consumer business, moving away from its dependence on business-to-business accounts.

The San Francisco market over the past 18 months has been hard hit by a series of major account departures, primarily stemming from mergers and business consolidations (AA, Aug. 18, 1986). Dole Food Co., after the acquisition of its parent, Castle & Cooke, took its $30 million account to New York (to William Esty Co. and then to Ted Bates Advertising). RJR Nabisco transferred an estimated $25 million in Del Monte USA billings to Lowe Marschalk, New York, from that agency's San Francisco office. Several other smaller accounts have moved their business to Los Angeles agencies.

West Coast News

At present, the market seems to have stabilized. But sources expect further consolidation of offices unless some major areas of new business arise.

Ketchum Communications, Pittsburgh, recently purchased the Oakland, Calif., office of Chicago-based Mandabach & Simms, and BBDO/West is expected to announce soon the acquisition of two shops in the Bay Area. Oakland-based Lewis, Browand & Associates is rumored to be one target.

Busse & Cummins received an undisclosed amount of Evans stock and cash in the transaction.#

Jaguar Cars broke print ads for its new $40,500 XJ6 May 15. Ads—via Geer, DuBois—are running in newsweeklies, business magazines, auto buff books and various upscale publications.

Domestic cars race to challenge European luxury

By PATRICIA STRNAD

DETROIT—The ultraluxury-car segment, long dominated by foreign nameplates, is becoming a marketing battlefield as more players—including U.S. automakers—try to lure affluent baby-boomers.

Many automakers are starting to court the growing number of young, affluent buyers of high-price, high-performance luxury cars, whose annual household incomes are swelling beyond the $50,000 mark.

One industry analyst predicts that sales of ultraluxury automo-

(Continued on Page 65)

Philly ignored?

National sponsorship effort flags

By PHYLLIS FURMAN

National advertisers have expressed little brotherly love for We, the People 200, Philadelphia's tribute to the Constitution which begins today.

Feuding between Philadelphia-based We, the People 200 and former Chief Justice Warren Burger's federally funded Constitution bicentennial commission has left Philadelphia's tribute without a single national corporate sponsor.

The state of Pennsylvania promised this month to kick in $2.5 million to help bail out organizers of the six-month celebration. The state also said it would double the amount if We, the People 200 can come up with $2.5 million in sponsor fees of its own.

Encouraged by the $100 million in corporate sponsorships generated by last year's successful Statue of Liberty centennial celebration, We, the People 200 had set a goal of raising $20 million from national sponsors.

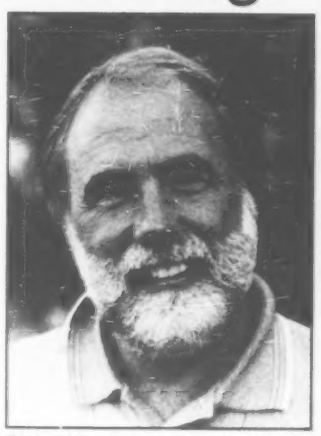
But the effort never got off the ground, and chief fund-raiser Richard Rovsek quit the project earlier this month.

Mr. Rovsek, president of Santa Barbara, Calif.-based American Marketing & Communications, charges that competition from Mr. Burger's commission undermined We, the People 200's corporate sponsorship efforts.

Mr. Rovsek, who handled marketing and sponsorships for Sail America, the U.S. entry in last winter's America's Cup, also is credited with conceiving the Statue of Liberty Foundation's corporate sponsorship effort.

Mr. Burger's Washington-based Foundation for the Commemoration of the U.S. Constitution, which publicly has voiced opposi-

(Continued on Page 65)



Richard Rovsek, president of American Marketing & Communications and chief fund-raiser for the constitutional celebration, quit the project this month.

World News Roundup

LONDON—Omnicom's Group's Doyle Dane Bernbach and Reeves Robertshaw Needham will merge May 26 to form DDB Needham Worldwide/-London, the latest step in creating one agency in markets where DDB and Needham operate separately. Only Needham client Van Melle Ltd. is expected to leave, pulling its $1.3 million Menthos chewy mint candies account because of conflicts with DDB's $7.5 million Trebor account, which includes mint candies.

SYDNEY—BMW Australia moved its $2.9 million account to The Ball Partnership, now owned by WCRS, from Ball's former owner, Ogilvy & Mather. O&M gained a $1.4 million Black Douglas whisky account, previously with Ball.

FRANKFURT—Chesebrough-Pond's moved its $4 million account to Ogilvy & Mather from D'Arcy Masius Benton & Bowles.

SYDNEY—The AWA Radio Network cut agency commission rates from 12.5% to 10%. Fairfax-owned Macquarie Network is expected to follow.

LONDON—ICI Fibres, a U.K.-based fibers producer, picked Colman RSCG here for a $7.5 million campaign to promote its Tactel fibers for the

(Continued on Page 48)

Ratings race is on

'Family Ties' shift sets up key fall fight

By JAMES P. FORKAN

NEW YORK—NBC's shift this fall of "Family Ties" to Sunday opposite CBS' "Murder, She Wrote" will hurt both top 10 series, many agency executives believe, and may enable CBS and ABC to erode NBC's blockbuster Thursday lead.

Most agency sources saw "Family Ties" (No. 2 last season) versus "Murder, She Wrote" (No. 4) as this fall's clash of the series titans, much as the "Miami Vice" vs. "Dallas" battle was billed a year ago. That contest resulted in both programs dropping out of the seasonlong top 10, though "Dallas'" 11th place '86-87

(Continued on Page 68)

'M*A*S*H' is smash in ad awareness

IBM's new 'reunion' TV spots put Apple's action in traction

By SCOTT HUME

Who needs Alan Alda?

The last original episode of "M*A*S*H" aired on Feb. 28, 1983, a two-hour farewell episode that set viewership records.

Four years later, the cast of "M*A*S*H" still has the power to set records.

Seeking to revive sales of its personal computers, IBM Corp. last month unveiled its new Personal System/2 line. Shelving the Chaplin-esque "Little Tramp" character who had represented its PCs for the past six years, IBM enlisted most of the "M*A*S*H" cast to appear in the estimated $50 million introductory ad campaign (AA, April 6).

One of the stars missing from the campaign was Mr. Alda, who has been an ad spokesman for Atari Corp., an IBM competitor.

The "M*A*S*H" "reunion" concept, developed by Lord, Geller, Federico, Einstein, New York, has been an immediate hit, even without the popular Mr. Alda.

When the 1,000 respondents to ADVERTISING AGE's adWatch survey were asked last month to name the computer advertising that first came to mind, 23.7% named IBM.

In the March survey, before the new advertising's April 2 debut, IBM's advertising had been named first by only 13.8% of the national sample.

IBM's jump of nearly 10 percentage points not only is the largest single change in top-of-mind awareness ever registered in the computer category, but also displaced Apple Computer from the No. 1 spot for only the second time in the three years that the survey has tracked awareness of computer advertising.

Apple's share of first mentions last month dropped 4.8 points to 21.1%, the lowest score its advertising ever has registered.

Tandy Corp.'s Radio Shack held the No. 3 spot with a 2.3% share of first mentions.

Computers are hardly a mass-market product, which is one reason IBM supplemented the TV advertising with a heavy introductory print schedule, including 24-page inserts in a variety of news and computer magazines.

But IBM's campaign appears to be making the strongest impact on the most desirable demographics.

Top-of-mind recall for IBM ads was heaviest among respondents with the highest incomes.

Better than 15% of respondents

(Continued on Page 70)

April's Top 10 in top-of-mind awareness

Of all the advertising you have seen, heard or read in the past 30 days, which advertisement first comes to mind?
Source: SRI Research Center Inc., Lincoln, Neb.

Rank 4/87	3/87	Advertiser	Agency
1	2	Pepsi-Cola	BBDO Worldwide
2	1	California Raisins	Foote, Cone & Belding
3	3	Coca-Cola	McCann-Erickson
4	4	McDonald's	Leo Burnett USA
5	5	Ford	J. Walter Thompson USA
6	7	Budweiser/Bud Light	D'Arcy Masius Benton & Bowles/DDB Needham Worldwide
7	10	Miller/Miller Lite	J. Walter Thompson Co./Backer & Spielvogel
8	6	Chevrolet	Campbell-Ewald USA
9	—	Tide	Saatchi & Saatchi Compton
10	—	AT&T	Ogilvy & Mather

Wine industry stays cool

Domestic market shows strength against imports

By JOHN C. MAXWELL JR.

Overall wine consumption increased about 3% in 1986, mainly due to the continued strong growth of wine coolers.

Wine cooler volume was up by more than 60% in '86, and dollar sales up by 73% to $1.3 billion.

This spectacular growth helped domestic wine gallonage increase by 10.3% and offset the decline of imported wines. We estimate that, excluding coolers, the domestic wine industry would have declined about 3% to 4%.

Wine coolers currently account for more than 30% of the domestic wine market and more than 25% of the total industry.

As the wine industry has been shaken by wine coolers, the wine cooler market has been shaken up by major players competing for their share in the market.

This shakeout began to take effect in 1985, when four coolers (E&J Gallo Winery's Bartles & Jaymes, Brown-Forman's California Cooler, Canandaigua's Sun Country and Seagram) accounted for almost 75% of the market.

These four brands continued to dominate the market in '86 but still were not able to shake off some smaller players. Joseph Victori Wines' Calvin Cooler, for instance, with a 6.4% share in '85, grew approximately 120% to an 8.3% share last year.

Similarly, Sun Country, Seagram and Bartles & Jaymes also grew by more than 100% and increased share.

Faced with these major growth rates, Brown-Forman's relatively small 10% growth caused California Cooler to lose 9.4 share points and the No. 1 position. Bartles & Jaymes quickly picked up the lead in '86, with 26.2% of the market.

We expect 1987 to be another year of stiff, relentless competition, supported by huge ad budgets and innovative marketing tactics.

In addition, we expect the enormous growth of the past few years to begin to slow and new flavors to emerge in the continuing race for market share in the wine cooler industry.

Although wine cooler growth has leveraged the wine industry, it also has affected table wine growth. While wine coolers have hurt domestic wines, it appears they benefited from the declining demand for imported wines.

In 1986 we saw a greater than 20% decline in imports, with more than 30% declines in both Italian and German wines. Although some of this may be a residual effect of the fear from last year's contamination in Italian wines, more likely it is a result of the declining dollar, which puts imports at a greater price disadvantage.

All five major importing countries posted declines in '86. With the improved quality and value of domestic wines, we believe that this situation will continue. Of course, the magnitude of this trend depends on the currency situation.

Again, E&J Gallo Winery increased market share to approximately 28%, maintaining the No. 1 position in the domestic wine market. Most of Gallo's 9.4% growth was attributable to the strong performance of its Bartles & Jaymes wine cooler.

Also due to the strength of its wine cooler business, Seagram Wine Co. showed a gain of almost 9%. Canandaigua Wine Co. posted a strong increase from its Sun Country cooler.

As for the rest of the wine industry, we expect to see a continuing trend of buyouts in 1987.

California wineries' margins have been lowered severely due to the diversion of marketing dollars to coolers, the decreased shelf space available for wine (also due to coolers) and increasing packaging and wine costs.

We believe these conditions will continue to be the force behind the sale of many top brands.

Already this year, Grand Metropolitan acquired Heublein, which included Heublein's recent acquisition of Almaden Vineyards, while Vintners International acquired Seagram and Wine World acquired Soverain.#

Mr. Maxwell is with Furman Selz Mager Dietz & Birney, New York.

U.S. wine market: Sales and shares

Sales in millions of gallons. *Source: John C. Maxwell Jr.*

Rank 1986	Rank 1985	Company	1984 Amount	1984 Share	1985 Amount	1985 Share	1986 Amount	1986 Share	Change 1985-86
1	1	E&J Gallo	142.0	25.6%	152.5	26.4%	166.8	28.0%	9.4%
2	2	Vintners Int'l.*	49.9	9.0	57.0	9.9	62.0	10.4	8.8
3	3	Canandaigua	19.5	3.5	31.0	5.4	45.0	7.6	45.2
4	4	Almaden	26.9	4.5	23.8	4.1	24.3	4.1	1.9
5	5	Heublein	21.5	3.9	20.8	3.6	20.3	3.4	(2.5)
6	6	Franzia	14.3	2.6	16.2	2.8	18.6	3.1	14.9
7	7	Monarch	13.0	2.3	13.2	2.3	13.5	2.3	2.3
8	8	Guild	10.5	1.9	9.7	1.7	11.1	1.9	14.1
9	9	Sebastiani	6.0	1.1	6.6	1.1	5.2	0.9	(21.1)
10	12	Lamont	3.6	0.6	3.7	0.6	5.1	0.8	37.9
11	11	Beringer	3.8	0.6	3.9	0.7	4.8	0.8	25.1
12	10	Robert Mondavi	3.9	0.7	4.0	0.7	4.1	0.7	0.9
13	11	Mogen David	4.0	0.7	3.9	0.7	3.5	0.6	(10.3)
14	11	Bronco	2.9	0.5	3.9	0.7	3.3	0.6	(15.4)
15	14	Christian Bros.	3.3	0.6	3.2	0.5	2.8	0.5	(11.5)
16	13	Gibson	4.3	0.8	3.6	0.6	2.7	0.5	(24.2)
17	16	F. Korbel	2.1	0.4	2.4	0.4	2.7	0.5	12.4
18	15	C. Mondavi	3.2	0.6	2.7	0.5	2.5	0.4	(8.7)
19	17	Delicato	2.2	0.4	1.8	0.3	2.2	0.4	20.8
20	18	California Growers	0.4	0.1	1.5	0.3	2.0	0.3	31.1
21	—	ISC	—	—	1.2	0.2	1.8	0.3	59.2
22	18	Weibel	1.7	0.3	1.5	0.3	1.5	0.2	(6.1)
23	18	Guimarra	1.9	0.4	1.5	0.3	1.2	0.2	(23.6)
24	20	San Martin	0.7	0.1	0.9	0.1	1.2	0.2	25.1
25	19	Wente	1.4	0.3	1.2	0.2	1.0	0.2	(21.6)
26	21	Mirasou	0.6	0.1	0.7	0.1	0.9	0.1	37.1
27	20	Sierra Wines	0.9	0.1	0.9	0.2	0.9	0.1	2.0
28	20	Sonoma	1.0	0.2	1.2	0.2	0.8	0.1	(31.3)
29	21	M&H	0.6	0.1	0.7	0.1	0.6	0.1	(16.2)
30	22	Louis Martini	0.6	0.1	0.6	0.1	0.6	0.1	4.5
31	23	East-Side	0.3	0.1	0.2	—	0.4	0.1	85.5
32	23	Brookside	0.2	—	0.2	—	—	—	—
33	—	Pacific Land & Viticulture	—	—	—	—	—	—	—
		Subtotal	342.2	62.6	373.2	64.6	413.4	69.2	10.8
		Other Domestic	64.8	11.7	67.8	11.7	72.9	12.2	7.5
		Total Domestic	412.0	74.3	441.0	76.3	486.3	81.7	10.3
		Imports	142.4	25.7	136.7	23.7	108.7	18.3	(20.5)
		Total	554.4	100.0	577.7	100.0	595.0	100.0	3.0

*Purchased Seagram Wines.

FDA may take nip at toothpaste claims

By LAURIE FREEMAN and NANCY GIGES

The battle for superiority among the top three U.S. toothpaste marketers is heating up on the regulatory front as Procter & Gamble Co., Colgate-Palmolive Co. and Lever Bros. push their ad claims to new limits.

By this summer, the Food & Drug Administration is expected to decide whether to change the classification of tartar and plaque-removal toothpastes—and their accompanying claims—from cosmetic to therapeutic.

If the FDA reclassifies the tartar-control and anti-plaque toothpastes, the companies would have to seek new-drug status for their products to continue making certain therapeutic claims in labeling and advertising. And to win new-drug approval, a product has to be tested and found to be safe and effective.

The FDA is said to be "intent on exploring" the dentifrices and their plaque-removal claims, because "plaque is considered to be the forerunner of serious periodontal disease."

At the same time, the three marketers have stepped up their negotiations with the American Dental Association on using its coveted Seal of Acceptance, not only for cavity prevention but also for gum-related diseases.

The ADA's Council on Dental Therapeutics, independently of the FDA, reviews products—and their claims and advertising—that apply for the seal (AA, March 19, 1984, *et seq.*).

The Big 3 dentifrice marketers are clawing to gain market share in the hotly competitive $1 billion market and especially in the growing $250 million plaque/tartar segment.

Cincinnati-based P&G's Crest, the long-time front-runner in the category, has regained its 39% market share (after dropping to the low 30s) with the tartar-control line extension it introduced a little more than a year ago.

> FDA staffers expressed dismay when references to tartar and plaque began appearing in ad claims, but the issue was given low priority because the claims were not considered to cause any health damage.

New York-based Colgate, the No. 2 brand with a 23% share, has counterattacked with an ad campaign claiming that new research shows Colgate Tartar-Control toothpaste is better than Crest's.

CBS-TV earlier this month rejected P&G's objection to the ad claims that Colgate made in its new TV commercials.

Lever, also New York, is aiming to improve the 7% share of the No. 4 brand, Aim, by introducing Extra-Strength Aim and claiming superiority over both Crest and Colgate in cavity-fighting (AA, May 4).

Last week Lever broke two new hard-hitting TV spots for Aim, claiming fluoride superiority.

Lever also is gearing up to launch tartar-control companions to Aim and Close-Up toothpastes.

D'Arcy Masius Benton & Bowles, New York, handles Crest; Young & Rubicam is Colgate Tartar-Control's agency; and SSC&B handles Aim.

While the Big 3 fight for consumers' attention, the FDA is becoming more concerned about these ever-bolder therapeutic claims regarding tartar and plaque removal when the products themselves are classified by the FDA as having cosmetic benefit only.

According to one measurement service, tartar-control toothpastes now account for almost one-third of the toothpaste market.

FDA staffers expressed dismay when references to tartar and plaque began appearing in ad claims, but the issue was given low priority because the claims were not considered to cause any health damage.

Toothpaste marketers have been striving to avoid FDA scrutiny by limiting their claims to removal or reduction of plaque and tartar *above the gum line*, where the relationship to gum disease is not well documented.

Now, having been pushed too far, the FDA within weeks is expected to "open a call for data" on the role of tartar, plaque and gingivitis and their relationship to gum disease.

"Plaque is not [simply] a cosmetic problem, like tartar," said an executive for a major toothpaste company.

Despite the prospect of more stringent federal regulations, marketers in the $830 million mouthwash market also have been airing stronger comparative ads.

Warner-Lambert Co., Morris Plains, N.J., now marketing Listerine mouth rinse as a cosmetic plaque-removal agent, is seeking to strengthen its therapeutic claims.

While still pursuing the ADA's Seal of Acceptance for plaque removal, Warner-Lambert places more hope in winning the FDA's approval to market Listerine as effective against gingivitis, a form of gum disease.

In addition, Oral Research Laboratories, New York, is seeking ADA and/or FDA approval for its Plax product as an anti-gingivitis agent. Plax is described as a pre-brushing dental rinse.

Vipont Pharmaceutical, also jockeying for ADA approval, nearly doubled in size this year based on sales of its Viadent anti-plaque toothpaste and mouthwash products, which help remove the sticky bacteria that builds up on teeth.

Until now, the tiny, Fort Collins, Colo.-based company has been the most aggressive

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